STATE OF TENNESSEE
State Department of Education

REQUEST FOR PROPOSALS
FOR
Statewide Student Management Software

RFP Number: 331.25-001

1   INTRODUCTION

1.1   Statement of Purpose

The purpose of this Request for Proposals (RFP) is to define the State's minimum requirements, solicit proposals, and gain adequate information by which the State may evaluate the services offered by Proposers.

The State of Tennessee, State Department of Education, hereinafter referred to as the State, intends to secure a contract for a Statewide Student Management Software package (SSMS) for use by local school districts and the department staff. This server hardware/software will be centrally managed so it can be supported by department personnel. The statewide student management software must be flexible with the ability to respond to constantly changing legislative mandates. The software must also satisfy reporting obligations, 'No Child Left Behind' requirements, and ensure effective oversight of Local Education Agencies in accordance with the Tennessee Education Improvement Act of 1992. SSMS should be a web-based application with no workstation client software or code, other than the browser, required to run the application. Any proposal submitted proposing other than a pure web-based solution will be considered non-responsive and will be rejected.

There are currently 1,681 state schools within 136 Local Education Agencies that record information in a student management software package or local (in-house) independent system. Information for over 940,000 students and 62,000 staff members is recorded. The Department of Education utilizes the Internet and web-based technologies to deliver information for the benefit of K-12 (kindergarten through grade 12) public Local Education Agencies. Local Education Agencies include all the State's 136 district offices and their respective local schools.

The following table details the number of school districts within each membership configuration and is provided for information only. The Average Daily Membership (ADM) is a calculation that is used to determine the number of students in each district.

Average Daily Membership	# of Districts
< 500	4
501 – 1,000	11
1,001 – 2,000	23
2,001 – 3,000	21
3,001 – 4,000	16
4,001 – 5,000	16
5,001 – 10,000	26
10,001 – 15,000	9
15,001 – 20,000	0
20,000 – 25,000	1
25,001 – 30,000	3
30,001 – 40,000	0
40,001 – 50,000	2
50,001 – 60,000	1
60,001 – 70,000	0
> 70,000	2

The software will be installed using a phase in approach. It is the intent of SDE to have some of the smaller districts ready to begin using SSMS by July 1, 2004. These districts/schools will

serve as pilot sites to validate any requirements with the software, training, and documentation. Other districts will come online as needed after the July 1, 2004 date. The RFP and subsequent contract will provide for implementing all 136 school districts. However, it is not anticipated that all 136 school districts will choose to participate.

The selected districts to be implemented in the pilot year and subsequent years will be done on a volunteer basis. It is expected that there will be districts from middle, east, and west Tennessee and there will be a mixture of small, medium, and large school districts. Those school districts who currently cannot report electronically to the Education Information System will be the first pilot districts. If the number of volunteers exceeds the number that is to be implemented in any given year, then the Department will select the districts to be converted from a lottery.

The anticipated technology involved in implementing the Statewide Student Management Software will build on the current infrastructure being used for other departmental web-based applications. The State will purchase new servers and database software licensing for this software. The new Statewide Student Management Software will utilize current State standard technologies.

1.2   Scope of Service

Section A, B, and C of the *pro forma* contract, included in Section 8 of this RFP, details the scope of services and deliverables that the State requires.

The *pro forma* contract also includes the terms and conditions required by the State.

1.3   Contract Duration

The State intends to enter into a contract with an effective period of January 1, 2004 through June 30, 2008.

1.4   Letter of Intent to Propose

A letter indicating a vendor's intent to respond to this RFP with a proposal should be sent to the RFP Coordinator (refer to Section 3.1) no later than the *Letter of Intent to Propose* deadline date detailed in the Section 2, RFP Schedule of Events. *Letters of Intent to Propose* may be delivered by facsimile transmission. Vendors may withdraw their *Letters of Intent to Propose* at any time before the deadline for submitting a proposal.

The following information should be included in the *Letter of Intent to Propose*:

> Vendor Name
> Name and Title of Vendor Main Contact
> Address, Telephone Number, and Facsimile Number of Vendor Main Contact
> Signed Statement of Intent to Propose

Submittal of a *Letter of Intent to Propose*, by the specified deadline, is not a prerequisite for submitting a proposal, but it is necessary to ensure a vendor's receipt of RFP amendments and other communications regarding the RFP.

1.5   Proposal Deadline

Proposals shall be submitted no later than the Proposal Deadline time and date detailed in the Section 2, RFP Schedule of Events. Proposers shall respond to the written RFP and any

exhibits, attachments, or amendments. A Proposer's failure to submit a proposal as required before the deadline shall cause the proposal to be disqualified.

Proposers assume the risk of the method of dispatch chosen. The State assumes no responsibility for delays caused by any delivery service. Postmarking by the due date shall not substitute for actual proposal receipt by the State. Late proposals shall not be accepted nor shall additional time be granted to any potential Proposer.

Proposals may not be delivered orally, by facsimile transmission, or by other telecommunication or electronic means.

1.6   Nondiscrimination

No person shall be excluded from participation in, be denied benefits of, be discriminated against in the admission or access to, or be discriminated against in treatment or employment in the State's contracted programs or activities on the grounds of disability, age, race, color, religion, sex, national origin, or any other classification protected by federal or Tennessee State Constitutional or statutory law; nor shall they be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of contracts with the State or in the employment practices of the State's contractors. Accordingly, all vendors entering into contracts with the State shall, upon request, be required to show proof of such nondiscrimination and to post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.

The State has designated the following to coordinate compliance with the nondiscrimination requirements of the State of Tennessee, Title VI of the Civil Rights Act of 1964, the Americans with Disabilities Act of 1990, and applicable federal regulations:

Dr. May Alice Ridley, Director of Office of Civil Rights
Tennessee Department of Education
5th Floor Andrew Johnson Tower
710 James Robertson Parkway
Nashville, TN 37243
Phone: (615) 532-4982

1.7   Assistance to Proposers With a Disability

Proposers with a disability may receive accommodation regarding the means of communicating this RFP and participating in this procurement process. Proposers with a disability should contact the RFP Coordinator to request reasonable accommodation no later than the deadline for accommodation requests detailed in the Section 2, RFP Schedule of Events.

2   RFP SCHEDULE OF EVENTS

The following RFP Schedule of Events represents the State's best estimate of the schedule that shall be followed. Unless otherwise specified, the time of day for the following events shall be between 8:00 a.m. and 4:30 p.m., Central Time.

The State reserves the right, at its sole discretion, to adjust this schedule as it deems necessary. Notification of any adjustment to the Schedule of Events shall be provided to all vendors that submitted a *Letter of Intent to Propose*.

	EVENT	DATE	TIME
1	State Issues RFP	10-31-03	
2	Deadline for Proposers with a Disability to Make Accommodation Requests	11-7-03	
3	Pre-proposal Conference	11-12-03	10:00 a.m.
4	Deadline for *Letter of Intent to Propose*	11-14-03	
5	Deadline for Written Comments	11-19-03	
6	State Issues Responses to Written Comments	11-26-03	
7	Deadline for Submitting a Proposal and State Opens Technical Proposals	12-3-03	3:00 p.m.
8	State Completes Technical Evaluations	12-9-03	
9	State Opens Cost Proposal	12-10-03	9:00 a.m.
10	State Completes Cost Evaluations	12-10-03	
11	State Sends a written Evaluation Notice to Proposers and State Opens RFP Files for Public Inspection	12-11-03	9:00 a.m.
12	Conclusion of Contract Negotiation, and Contract Signing	12-29-03	
13	Anticipated Contract Start Date	1-1-04	
14	Deadline for Performance Bond (failure to submit the performance bond as required shall result in contract termination)	1-16-04	

3 GENERAL REQUIREMENTS AND INFORMATION

3.1 RFP Coordinator

The following RFP Coordinator shall be the main point of contact for this RFP.

> Michael Timme, RFP Coordinator
> Tennessee Department of Education
> Office of Fiscal Services
> 6th Floor, Andrew Johnson Tower
> 710 James Robertson Parkway
> Nashville, TN 37243
> Phone: (615) 532-8539
> Fax: (615) 741-6793
> email: Michael.Timme@state.tn.us

3.2 RFP Number

The State has assigned the following RFP identification number that must be referenced in all communications regarding the RFP:

RFP - 331.25-001

3.3 Communications Regarding the RFP

3.3.1   Upon release of this RFP, all vendor communications concerning this procurement must be directed to the RFP Coordinator. Unauthorized contact regarding the RFP with other State employees of the procuring state agency may result in disqualification.

3.3.2   All communications should be in writing to the RFP Coordinator. Any oral communications shall be considered unofficial and nonbinding on the State. Written Comments, including questions and requests for clarification, must cite the subject RFP number. The RFP Coordinator must receive these written requests by the deadline specified in the RFP Schedule of Events.

3.3.3   Any communication regarding this RFP sent by facsimile transmission must also be sent by United States mail on the same date.

3.3.4   The State shall respond in writing to written communications. Such response shall constitute an amendment to the RFP. Only written responses to written communications shall be considered official and binding upon the state. The State reserves the right, at its sole discretion, to determine appropriate and adequate responses to written comments, questions, and requests for clarification.

3.3.5   The State shall mail copies of its written responses to written comments, to all vendors submitting a *Letter of Intent to Propose*.

3.3.6   Any data or factual information provided by the State shall be deemed for informational purposes only, and if a proposer relies on said factual information it should either:

   a)   independently verify the information; or

   b)   obtain the State's written consent to rely thereon.

3.4   Required Review and Waiver of Objections by Proposers

Proposers should carefully review this RFP and all attachments, including but not limited to the *pro forma* contract, for comments, questions, defects, objections, or any other matter requiring clarification or correction (collectively called "comments"). Comments concerning RFP objections must be made in writing and received by the State no later than the Deadline for Written Comments detailed in the Section 2, RFP Schedule of Events. This will allow issuance of any necessary amendments and help prevent the opening of defective proposals upon which contract award could not be made.

Protests based on any objection shall be considered waived and invalid if these comments/objections have not been brought to the attention of the State, in writing, by the Deadline for Written Comments.

3.5   Proposal Submittal

3.5.1   Proposers shall respond to this RFP with a Technical Proposal and a Cost Proposal. No pricing information shall be included in the Technical Proposal.

Inclusion of Cost Proposal amounts in the Technical Proposal shall make the proposal nonresponsive.

One (1) original and seven (7) copies of the Technical Proposal shall be submitted to the State in a sealed package and be clearly marked:

"Technical Proposal in Response to RFP-331.25-001-- Do Not Open"

One (1) Cost Proposal shall be submitted to the State as a separate, sealed package and clearly marked:

"Cost Proposal in Response to RFP-331.25-001 -- Do Not Open"

If the separately sealed proposals, marked as required above, are enclosed in another container for mailing purposes, the outermost container must fully describe the contents of the package and must be clearly marked:

"Contains Separately Sealed Technical and Cost Proposals"

3.5.2   All proposals must be submitted to the RFP Coordinator at the following address by the date and time identified as the Deadline for Submitting a Proposal in the RFP Schedule of Events.

Michael Timme, RFP Coordinator
Tennessee Department of Education
Office of Fiscal Services
6th Floor, Andrew Johnson Tower
710 James Robertson Parkway
Nashville, TN 37243

3.6   Proposal Preparation Costs

The State shall not pay any costs associated with the preparation, submittal, or presentation of any proposal.

3.7   Proposal Withdrawal

To withdraw a proposal, the vendor must submit a written request, signed by an authorized representative, to the RFP Coordinator. After withdrawing a previously submitted proposal, the vendor may submit another proposal at any time up to the deadline for submitting proposals.

3.8   Proposal Amendment

The State shall not accept any amendments, revisions, or alterations to proposals after the deadline for proposal submittal unless such is formally requested, in writing, by the State.

3.9   Proposal Errors

Proposers are liable for all errors or omissions contained in their proposals. Proposers shall not be allowed to alter proposal documents after the deadline for submitting a proposal.

3.10   Incorrect Proposal Information

If the state determines that a proposer has provided, for consideration in the evaluation process or contract negotiations, incorrect information which the proposer knew or should have known was materially incorrect, that proposal shall be determined non-responsive, and the proposal shall be rejected.

3.11   Prohibition of Proposer Terms and Conditions

A Proposer may **not** submit the Proposer's own contract terms and conditions in a response to this RFP. If a proposal contains such terms and conditions, the State, at its sole discretion, may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.

3.12   Assignment and Subcontracting

3.12.1   The Contractor may not subcontract, transfer, or assign any portion of the contract without prior, written approval from the State. Each subcontractor must be approved in writing by the State. The substitution of one subcontractor for another may be made only at the discretion of the State and with prior, written approval from the State.

3.12.2   Notwithstanding the use of approved subcontractors, the Proposer, if awarded a contract under this RFP, shall be the prime contractor and shall be responsible for all work performed.

3.13   Right to Refuse Personnel

The State reserves the right to refuse, at its sole discretion, any subcontractors or any personnel provided by the prime contractor or its subcontractors.

3.14   Proposal of Alternate Services

Proposals of alternate services (*i.e*., proposals that offer something different from that requested by the RFP) shall be considered nonresponsive and rejected.

3.15   Proposal of Additional Services

If a Proposer indicates an offer of services in addition to those required by and described in this RFP, these additional services may be added to the contract before contract signing at the sole discretion of the State.

The cost for any such additional services must be incorporated into the required cost amount(s) provided in the Cost Proposal so that all proposals may be equitably evaluated. The Proposer shall **not** propose unrequested rates as separate, additional rates for additional services. (Refer to Section 5.3 of this RFP for Cost Proposal requirements.)

3.16   Independent Price Determination

3.16.1   A proposal shall be disqualified and rejected by the State if the price in the proposal was not arrived at independently without collusion, consultation, communication, or agreement as to any matter relating to such prices with any other Proposer, a State employee, or any competitor.

3.16.2   The Proposer is prohibited from submitting more than one proposal. Submittal of more than one proposal shall result in the disqualification of the Proposer.

3.16.3   The Proposer is prohibited from submitting multiple proposals in a different form (i.e., as a prime contractor and as a subcontractor to another prime contractor). Submittal of multiple proposals in a different form may result in the disqualification of all Proposers associated with a multiple proposal.

3.16.4   Should any such prohibited action detailed in Sections 3.16.1, 3.16.2, and 3.16.3 be detected any time during the term of the contract, such action shall be considered a material breach and grounds for contract termination.

3.17   Insurance

The apparent successful Proposer may be required to provide proof of adequate worker's compensation and public liability insurance coverage before entering into a contract. Additionally, the State may, at its sole discretion, require the apparent successful Proposer to provide proof of adequate professional malpractice liability or other forms of insurance. Failure to provide evidence of such insurance coverage is a material breach and grounds for termination of the contract negotiations. Any insurance required by the State shall be in form and substance acceptable to the State.

3.18   Licensure

Before a contract pursuant to this RFP is signed, the Vendor must hold all necessary, applicable business and professional licenses. The State may require any or all Proposers to submit evidence of proper licensure.

3.19   Conflict of Interest and Proposal Restrictions

3.19.1   By submitting a proposal, the Proposer certifies that no amount shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the procurement under this RFP.

Notwithstanding this restriction, nothing in this RFP shall be construed to prohibit a state agency or other governmental entity from making a proposal, being considered for award, or being awarded a contract under this RFP.

3.19.2   State agencies shall not contract with an individual who is, or within the past six months has been, an employee of the State of Tennessee. An individual shall be deemed a State employee until such time as all salary, termination pay, and compensations representing annual or compensatory leave have been paid by the State. A contract with a company in

which a controlling interest is held by a State employee shall be considered to be a contract with said individual and shall be prohibited.

3.19.3   Any individual, company, or other entity involved in assisting the State in the development, formulation, or drafting of this RFP or its scope of services shall be considered to have been given information that would afford an unfair advantage over other Proposers, and said individual, company, or other entity may not submit a proposal in response to this RFP.

3.20   RFP Amendment and Cancellation

The State reserves the unilateral right to amend this RFP in writing at any time. The State also reserves the right to cancel or reissue the RFP at its sole discretion. If an amendment is issued it shall be provided to all vendors submitting a *Letter of Intent to Propose*. Proposers shall respond to the final written RFP and any exhibits, attachments, and amendments.

3.21   Right of Rejection

3.21.1   The State reserves the right, at its sole discretion, to reject any and all proposals or to cancel this RFP in its entirety.

3.21.2   Any proposal received which does not meet the requirements of this RFP may be considered to be nonresponsive, and the proposal may be rejected. Proposers must comply with all of the terms of this RFP and all applicable State laws and regulations. The State may reject any proposal that does not comply with all of the terms, conditions, and performance requirements of this RFP.

3.21.3   Proposers may not restrict the rights of the State or otherwise qualify their proposals. If a Proposer does so, the State may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.

3.21.4   The State reserves the right, at its sole discretion, to waive variances in technical proposals provided such action is in the best interest of the State. Where the State waives minor variances in proposals, such waiver does not modify the RFP requirements or excuse the proposer from full compliance with the RFP. Notwithstanding any minor variance, the State may hold any Proposer to strict compliance with the RFP.

3.22   Disclosure of Proposal Contents

All proposals and other materials submitted in response to this RFP procurement process become the property of the State of Tennessee. Selection or rejection of a proposal does not affect this right. All proposal information, including detailed price and cost information, shall be held in confidence during the evaluation process. Upon the completion of the evaluation of proposals, indicated by public release of an Evaluation Notice, the proposals and associated materials shall be open for review by the public in accordance with ***Tennessee Code Annotated***, Section 10-7-504(a)(7). By submitting a proposal, the Proposer acknowledges and accepts that the <u>full</u> contents of the proposal and associated documents shall become open to public inspection.

3.23   Severability

If any provision of this RFP is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected; and, the rights and obligations of the State and Proposers shall be construed and enforced as if the RFP did not contain the particular provision held to be invalid.

4	**SPECIAL REQUIREMENTS**

4.1 Joint Ventures and Partnering

Proposals from joint ventures or entities partnering for a specific service must be designed to minimize any administrative burden on the State as a result of the participation of multiple entities.

4.1.1 The Proposal shall clearly set forth the respective responsibilities and functions that each Principal of the joint venture or partnering entities would perform if awarded a contract pursuant to this RFP.

4.1.2 The Proposal must include a copy of the joint venture or partnering agreements that identify the Principals involved as well as their rights and responsibilities regarding a contract pursuant to this RFP.

4.1.3 The proposal transmittal letter must be signed by each Principal of the joint venture and include all required information.

4.2 Pre-Proposal Conference

4.2.1 A pre-proposal conference for all potential Proposers is scheduled at the Pre-Proposal Conference time and date detailed in the Section 2, RFP Schedule of Events. The conference shall be held at:

> **Andrew Johnson Tower**
> **710 James Robertson Parkway**
> **Nashville, TN**
> **First Floor Conference Room**

Each vendor may send a maximum of 3 representatives. The purpose of the conference is to discuss the work to be performed with the prospective Proposers and allow them to ask questions concerning the RFP.

4.2.2 The state encourages all potential proposers to attend the pre-proposal conference although attendance is not mandatory.

4.2.3 Specific questions concerning the RFP should be submitted in writing before the pre-proposal conference so that the State may prepare responses before the conference. Additional questions shall be entertained at the conference; however, responses may be deferred and provided at a later date.

4.2.4 The response to any question that is given orally at the pre-proposal conference is to be considered tentative and nonbinding on the State. After the conference, the official response to questions shall be published in writing. This shall ensure accurate, consistent responses to all vendors. Copies of all written questions and the State's responses shall be mailed to all vendors submitting a *Letter of Intent to Propose*. Only the written responses from the State shall be considered official.

4.3 Location and Work Space

The work under this RFP is to be performed, completed, and managed at the Department of Education and the Contractor's business location. The State shall provide work-space for the Contractor. All work performed on the State's premises shall be completed during the State's standard business hours.

4.4   **Performance Bond**

The State shall require a performance bond upon approval of a contract pursuant to this RFP. The amount of the performance bond must be in the sum of Five million dollars ($5,000,000) and shall cover the period January 1, 2004 to June 30, 2005. For the period July 1, 2005 to June 30, 2008 the performance bond shall be reduced to Two and One Half million dollars ($2,500,000).

The successful Proposer shall obtain the required performance bond in form and substance acceptable to the State (as detailed by Attachment 9.7 of this RFP) and provide it to the State no later than January 16, 2004. Failure to provide the performance bond prior to the deadline as required shall result in contract termination.

In lieu of a performance bond, a surety deposit, in the sum of Five Million dollars ($5,000,000) for the period January 1, 2004 to June 30, 2005 may be substituted if approved by the State prior to its submittal.. For the period July 1, 2005 to June 30, 2008 the surety deposit shall be reduced to Two and One Half million dollars ($2,500,000)

5　　PROPOSAL FORMAT AND CONTENT

5.1　　General Proposal Requirements

5.1.1　　The State discourages lengthy and costly proposals. Proposals should be prepared simply and economically and provide a straightforward, concise description of the Proposer's capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content.

5.1.2　　Proposers must follow all formats and address all portions of the RFP set forth herein providing all information requested. Proposers may retype or duplicate any portion of this RFP for use in responding to the RFP, provided that the proposal clearly addresses all of the State's information requirements.

5.1.3　　Proposers must respond to every subsection under the Technical Proposal and Cost Proposal sections below. Proposers must label each response to RFP requirements with the section and subsection numbers associated with the subject requirement in this RFP (*e.g.*, the response to the third requirement of the Proposal Transmittal Letter would be labeled 5.2.1.3).

　　　　Failure to follow the specified format, to label the responses correctly, or to address all of the subsections may, at the State's sole discretion, result in the rejection of the Proposal.

　　　　Proposals must not contain extraneous information. All information presented in a Proposal must be relevant in response to a requirement of this RFP, must be clearly labeled, and, if not incorporated into the body of the Proposal itself, must be referenced to and from the appropriate place within the body of the Proposal. Any information not meeting these criteria shall be deemed extraneous and shall in no way contribute to the evaluation process.

5.1.4　　Proposals shall be prepared on standard 8 1/2" x 11" paper. Foldouts containing charts, spread sheets, and oversize exhibits are permissible. All responses, as well as any reference material presented, must be written in English. All monetary amounts must be detailed in United States currency. All proposal pages must be numbered.

5.1.5　　Proposers shall divide their responses to this RFP into a Technical Proposal and a Cost Proposal and submit them in accordance with Section 3.5 of this RFP by the Deadline for Submitting a Proposal in the RFP Schedule of Events.

　　　　Cost Proposal and pricing information shall **not** be included in the Technical Proposal. Inclusion of Cost Proposal dollar amounts in the Technical Proposal shall make the proposal nonresponsive and the proposal shall be rejected.

5.2　　Technical Proposal

　　　　The Technical Proposal shall be divided into the following sections:

　　　　　　Proposal Transmittal Letter;

　　　　　　Mandatory Proposer Qualifications;

　　　　　　General Proposer Qualifications and Experience;

　　　　　　Technical Approach;

　　　　　　Detailed Documentation of Proposer Financial Resources.

　　　　If a proposal fails to detail and address each of the requirements detailed herein, the State may determine the proposal to be nonresponsive and reject it.

5.2.1   Proposal Transmittal Letter. The Technical Proposal must provide a written transmittal and offer of the proposal in the form of a standard business letter. The Proposal Transmittal Letter shall reference and respond to the following subsections in sequence and attach corresponding documentation as required. Each proposal must meet the Proposal Transmittal Letter requirements and provide all required documentation. A Proposal Transmittal Letter is mandatory, and failure to provide the information as required may result in the proposal being considered nonresponsive and rejected.

5.2.1.1   The letter shall be signed by a company officer empowered to bind the proposing vendor to the provisions of this RFP and any contract awarded pursuant to it; if said individual is not the company president, the letter shall attach evidence showing authority to bind the company.

5.2.1.2   The letter shall state that the proposal remains valid for at least 120 days subsequent to the date of the Cost Proposal opening and thereafter in accordance with any resulting contract between the Proposer and the State.

5.2.1.3   The letter shall provide the complete name and Social Security Number of the individual or the legal entity name and Federal Employer Identification Number of the firm making the proposal.

5.2.1.4   The letter shall provide the name, mailing address, and telephone number of the person the State should contact regarding the proposal.

5.2.1.5   The letter shall state whether the Proposer intends to use subcontractors — if so, clearly identify the names of the subcontractors along with complete mailing addresses and the scope and portions of the work the subcontractors shall perform. (NOTE: The Contractor must obtain written approval from the State prior to the use of any subcontractors.)

5.2.1.6   The letter shall state whether the Proposer or any individual who shall perform work under the contract has a possible conflict of interest (*e.g.,* employment by the State of Tennessee) and, if so, the nature of that conflict. The State reserves the right to cancel an award if any interest disclosed from any source could either give the appearance of a conflict of interest or cause speculation as to the objectivity of the offeror. Such determination regarding any questions of conflict of interest shall be solely within the discretion of the State.

5.2.2   Mandatory Proposer Qualifications. Technical Proposals shall provide responses and documentation, as required, that indicate that the Proposer has met the Mandatory Proposer Qualifications requirements. Any Proposal which does not meet the mandatory requirements and provide all required documentation may be considered nonresponsive, and the proposal may be rejected.

Technical Proposals shall provide the following information (referencing the subsections in sequence):

5.2.2.1   written confirmation that the Proposer shall comply with all of the provisions in this RFP and shall accept all terms and conditions set out in the *pro forma* contract in Section 8 of this RFP. (NOTE: If the Proposal fails to provide said confirmation without exception or qualification, the State, at its sole discretion, may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.)

5.2.2.2   written certification and assurance of the Proposer's compliance with:

    a)   the laws of the State of Tennessee;
    b)   Title VI of the federal Civil Rights Act of 1964;
    c)   Title IX of the federal Education Amendments Act of 1972;
    d)   the Equal Employment Opportunity Act and the regulations issued thereunder by the federal government;

e) the Americans with Disabilities Act of 1990 and the regulations issued thereunder by the federal government;

f) the condition that the submitted proposal was independently arrived at, without collusion, under penalty of perjury; and,

g) the condition that no amount shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the Procurement under this RFP.

(Use Attachment 9.1, Certification of Compliance)

5.2.2.3   documentation of financial responsibility and stability; said documentation shall include:

5.2.2.3.1   a current written bank reference, in the form of a standard business letter, indicating that the proposer's business relationship with the financial institution is in positive standing

5.2.2.3.2   two current written, positive credit references, in the form of standard business letters, from vendors with which the proposer has done business; in lieu of such, documentation of a positive credit rating determined by a accredited credit bureau within the last 6 months, and

5.2.2.3.3   a copy of a valid certificate of insurance indicating liability insurance in the amount sufficient to cover any potential liability arising as a result of a contract pursuant to the RFP, and

5.2.2.4   written confirmation that the proposer will provide a performance bond in accordance with the requirements of the RFP.

5.2.3   General Proposer Qualifications and Experience. Technical Proposals shall provide the following information (referencing the subsections in sequence) to evidence the Proposer's experience in delivering services similar to those required by this RFP:

5.2.3.1   a brief, descriptive statement indicating the Proposer's credentials to deliver the services sought under this RFP;

5.2.3.2   a brief description of the Proposer's background and organizational history;

5.2.3.3   years in business;

5.2.3.4   a brief statement of how long the Proposer has been performing the services required by this RFP;

5.2.3.5   location of offices;

5.2.3.6   a description of the Proposer organization's number of employees, longevity, client base;

5.2.3.7   whether there have been any mergers, acquisitions, or sales of the Proposer company within the last ten years (if so, an explanation providing relevant details);

5.2.3.8   form of business (*i.e.*, individual, sole proprietor, corporation, non-profit corporation, partnership, joint venture, limited liability company, *et cetera*);

5.2.3.9   a statement as to whether the Proposer or any of the Proposer's employees, agents, independent contractors, or subcontractors have been convicted of, pled guilty to, or pled *nolo contendere* to any felony; and if so, an explanation providing relevant details;

5.2.3.10   a statement as to whether there is any pending litigation against the Proposer; and if such litigation exists, attach an opinion of counsel as to whether the pending litigation will impair the Proposer's performance in a contract under this RFP;

5.2.3.11   a statement as to whether, in the last ten years, the Proposer has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors; and if so, an explanation providing relevant details;

5.2.3.12   an organizational chart highlighting the key people who shall be assigned to accomplish the work required by this RFP and illustrating the lines of authority and designate the individual responsible for the completion of each service component and deliverable of the RFP;

5.2.3.13   a narrative description of the proposed project team, its members, and organizational structure;

5.2.3.14   a personnel roster and resumes of key people who shall be assigned by the Proposer to perform duties or services under the contract (include estimated number of hours to be worked on the contract for each person, and the resumes shall detail each individual's title, education, current position with the Proposer, and employment history);

5.2.3.15   customer references for similar projects representing both three of the larger accounts currently serviced by the vendor and three completed projects— each reference must include:

   a)   the company name and business address;

   b)   the name, title, and telephone number of the company contact knowledgeable about the project work; and

   c)   a brief description of the service provided and the period of service.

5.2.3.16   a list, if any, of all current contractual relationships with the State of Tennessee and all those completed within the previous five year period— the list must include:

   a)   the contract number;

   b)   the contract term; and

   c)   the procuring state agency for each reference.

   (NOTE: Current or prior contracts with the State are NOT a prerequisite to being awarded the maximum available points for the Proposer Qualifications and Experience category. The existence of such current or prior contractual relationships will not automatically result in the addition or deduction of evaluation points. Any such current or prior contractual relationships, like those detailed pursuant to Section 5.2.3.15., shall be generally considered in awarding Proposer Qualifications and Experience category points.)

5.2.4   Technical Approach. The Proposer shall describe the vendor's plans and approach for accomplishing the work requested. The information provided shall be in enough detail to enable the State to ascertain the Proposer's understanding of the effort to be accomplished and should outline the steps in the total service proposed. Technical Proposals shall provide the following narrative information (referencing the subsections in sequence) to evidence the suitability of the Proposer's technical approach to delivering the services sought under this RFP:

5.2.4.1   Proposers must provide a comprehensive narrative, captioned "Project Understanding," that illustrates the vendor's understanding of the State's requirements and project schedule.

5.2.4.2   Proposers must provide a comprehensive narrative, captioned "Project Approach," that illustrates how the Proposer will complete the scope of services, accomplish required objectives, and meet the State's project schedule.

5.2.4.3   Proposers must provide a comprehensive narrative, captioned "Project Management," that illustrates how the Proposer will manage the project, ensure completion of the scope of services, and accomplish required objectives within the State's project schedule.

5.2.4.4   Proposers must provide a response to all technical requirements as defined in the Proforma Contract sections A, B, and C and respond using RFP Attachment 9.3 Technical Evaluation Proposal Format.

5.2.5   Detailed Documentation of Financial Resources. The Proposer must provide the following documentation of sufficient financial strength and resources to provide the scope of services as required.

5.2.5.1   The Proposer's most recent independent audited financial statements for a fiscal year ended within the last 36 months. Compiled or reviewed financial statements will not be accepted.

5.2.5.1.1   The audited financial statements must be:

    a)   prepared with all monetary amounts detailed in United States currency;

    b)   prepared under United States generally accepted accounting principles; and

    c)   audited under United States generally accepted auditing standards.

5.2.5.1.2   The audited financial statements must include:

    a)   the auditor's opinion letter;

    b)   financial statements; and

    c)   the notes to the financial statements.

5.2.5.2   Documentation disclosing the amount of cash flows from operating activities for the proposer's most current operating period. Said documentation must indicate whether the cash flows are positive or negative, and, if the cash flows are negative for the most recent operating period, the documentation must include a detailed explanation of the factors contributing to the negative cash flows.

5.3   Cost Proposal

5.3.1   The Cost Proposal shall be submitted to the State in a separate, sealed package from the Technical proposal.

5.3.2   The Cost Proposal required format is provided in Attachment 9.2, and the Cost Proposal must be recorded on an exact duplicate thereof.

5.3.3   The Cost Proposal shall specifically record the exact cost amounts proposed in the appropriate space as required by Attachment 9.2. Said proposed cost shall incorporate all cost for the proposed scope of services for the total contract period.

5.3.4   The Cost Proposal shall record only the proposed cost as required, and shall not record any other rates, amounts, or information. It shall not record any text that could be construed as a qualification of the cost amounts proposed. If the Proposer fails to specify the Cost Proposal as required, the State shall determine the proposal to be nonresponsive and reject it.

5.3.5   The proposer must sign and date the Cost Proposal.

6	**EVALUATION AND CONTRACTOR SELECTION**

6.1   Proposal Evaluation Categories and Maximum Points

The categories that shall be considered in the evaluation of proposals are Qualifications and Experience, Technical Approach, and Cost. The maximum points that shall be awarded for each of these categories are:

CATEGORIES	MAXIMUM POINTS POSSIBLE
General Proposer Qualifications and Experience	35
Technical Approach	35
Cost Proposal	30

6.2   Proposal Evaluation Process

6.2.1   The evaluation process is designed to award the procurement not necessarily to the Proposer of least cost, but rather to the Proposer with the best combination of attributes based upon the evaluation criteria. Therefore, proposals are evaluated against the evaluation criteria in this RFP and NOT against other proposals.

6.2.2   The RFP Coordinator shall manage the proposal evaluation process and maintain proposal evaluation records. A Proposal Evaluation Team made up of three or more State employees shall be responsible for evaluating proposals.

6.2.3   All proposals shall be reviewed by the RFP Coordinator to determine compliance with basic proposal requirements as specified in this RFP. If the RFP Coordinator determines that a proposal may be missing one or more such requirements, the Proposal Evaluation Team shall review the proposal to determine:

a)   if it meets requirements for further evaluation;

b)   if the State shall request clarification(s) or correction(s); or

c)   if the State shall determine the proposal nonresponsive and reject it.

6.2.4   Chris Steppe, Director or Internal Audit, shall provide an analysis of each proposer's detailed documentation of financial resources. The analysis may include where appropriate (but not be limited to) an examination of the Current Ratio, Quick or Acid Test Ratio; Cash Ratio, Gross Working Capital to Total Assets Ratio, and Debt to Worth Ratio. The analysis shall result in a clear, written determination provided to the RFP Coordinator regarding whether each proposer's detailed documentation of financial resources indicated apparent financial strength, stability, and resources to provide the subject scope of services as required.

If a proposer's detailed documentation of financial resources is not clearly determined to indicate apparent financial strength and resources to provide the subject scope of services as required, the Proposal Evaluation Team shall review the proposal to determine if the State shall:

a)   request clarification(s) or correction(s); or

b)   determine the proposal nonresponsive and reject it.

6.2.5   The Proposal Evaluation Team shall evaluate responsive proposals. Each evaluator shall score the General Proposer Qualifications and Experience section and the Technical Approach section of each proposal. The evaluation scoring shall use the pre-established evaluation criteria and weights set out in this RFP. Each evaluator shall use only whole numbers for scoring proposals. (Refer to Attachment 9.3, Technical Proposal Evaluation Format).

6.2.6   The State reserves the right, at its sole discretion, to request clarifications of technical proposals or to conduct discussions for the purpose of clarification with any or all Proposers. The purpose of any such discussions shall be to ensure full understanding of the proposal. Discussions shall be limited to specific sections of the proposal identified by the State and, if held, shall be after initial evaluation of Technical Proposals. If clarifications are made as a result of such discussion, the Proposer shall put such clarifications in writing.

6.2.7   Upon completion of Technical Proposal scoring by the Proposal Evaluation Team, the RFP Coordinator shall calculate the average Technical Proposal score for each proposal.

6.2.8   After opening the Cost Proposals, the RFP Coordinator shall calculate scores for each Cost Proposal. The Cost Evaluation score shall be based on the proposed cost for evaluation amount indicated by the Cost Proposal. The amount shall be used in the following formula to determine the points a Proposer shall receive for the Cost Proposal:

$$\frac{\text{lowest proposed cost for evaluation}}{\text{proposed cost for evaluation being evaluated}} \quad X \quad \text{maximum cost points} \quad = \text{SCORE of cost proposal being evaluated}$$

(Refer to Attachment 9.4, Cost Proposal Evaluation Format, for details.)

6.2.9   The RFP Coordinator shall combine the average Technical Evaluation scores with the Cost Evaluation scores for each Proposer. (Refer to Attachment 9.5, Proposal Score Summary Matrix).

6.2.10   All proposal evaluation calculations shall result in numbers rounded to the nearest two decimal places (*e.g*., 9.99).

6.3   Contract Award Process

6.3.1   The RFP Coordinator shall forward results from the proposal evaluation process to the head of the procuring agency for consideration.

6.3.2   The State reserves the right to make an award without further discussion of any proposal submitted. There shall be no best and final offer procedure. Therefore, each proposal should be initially submitted on the most favorable terms the vendor can offer.

6.3.3   After the evaluation of proposals and final consideration of all pertinent information available, the head of the procuring agency shall issue a written Evaluation Notice to all Proposers. The notice shall identify the apparent best evaluated Proposer. The notice shall not create rights, interests, or claims of entitlement in the apparent best evaluated Proposer or any vendor. (Refer to Attachment 9.6 for a sample notice).

6.3.4   The RFP files shall be made available for public inspection.

6.3.5   The State reserves the right, at its sole discretion, to negotiate with the apparent best evaluated Proposer subsequent to the Evaluation Notice.

6.3.6   The apparent best evaluated Proposer shall be prepared to enter into a contract with the State which shall be substantially the same as the *pro forma* contract included in Section 8 of this RFP. Notwithstanding, the State reserves the right to add terms and conditions, deemed to be in the best interest of the State, during final contract negotiations. Any such terms and conditions shall be within the scope of the RFP and shall not affect the basis of proposal evaluations.

6.3.7   If a Proposer fails to sign and return the contract drawn pursuant to this RFP and final contract negotiations within 14 days of its delivery to the Proposer, the State may determine, at its sole discretion, that the Proposer is nonresponsive to the terms of this RFP and reject the proposal.

6.3.8   If the State determines that the apparent best evaluated Proposer is nonresponsive and rejects the proposal after opening Cost Proposals, the RFP Coordinator shall re-calculate scores for each responsive Cost Proposal and award the Contract in accordance with the requirements of 6.2.8., *et seq*., above.

6.3.9   Contract award shall be subject to the contract approval of all appropriate State officials in accordance with applicable State laws and regulations.

7	**STANDARD CONTRACT INFORMATION**

7.1   Contractor Registration

Contractor Registration is required of all state contractors. Proposers need not be registered with the state to make a proposal. However, all service providers with whom the state of Tennessee contracts must register through the Department of Finance and Administration *Service Provider Registry System* (SPRS) prior to contract approval. Any unregistered service provider must simply file a completed registration with the State prior to the final approval of a contract.

7.1.1   The SPRS is intended to foster the state's use of minority and small businesses and promote competition in service contracting. Through the system, state agencies will have access to ownership and service information about potential service providers. For more information, visit the SPRS Internet site at http://www.state.tn.us/finance/rds/ocr/sprs.html or direct questions about SPRS registration to:

> Department of Finance and Administration
> Office of Contracts Review
> 12 th Floor, William R. Snodgrass Tennessee Tower
> Nashville, TN 37243-1700
> (615) 741-7662

7.1.2   This RFP details SPRS registration information only as a contract requirement notice. SPRS registrations should <u>not</u> be submitted with proposal materials. SPRS registration information will <u>not</u> be considered in the evaluation process pursuant to this RFP.

7.1.3   If a Proposer fails to register with the state as a service provider as required by the Department of Finance and Administration within 14 days of final contract negotiations, the State may determine, at its sole discretion, that the Proposer is nonresponsive to the terms of this RFP.

7.2   Contract Approval

The RFP and the contractor selection processes do **not** obligate the State and do **not** create rights, interests, or claims of entitlement in the apparent best evaluated Proposer or any vendor. Contract award and State obligations pursuant thereto shall commence **only** after the contract is signed by the Contractor and the head of the procuring state agency **and** after the contract is signed by all other State officials as required by State laws and regulations to establish a legally binding contract.

7.3   Contract Payments

Contract payments shall be made in accordance with the Payment Terms and Conditions provision of the final contract.

No payment shall be made until the contract is approved as required by State laws and regulations. Under no conditions shall the State be liable for payment of any type associated with the contract or responsible for any work done by the Contractor, even work done in good faith and even if the Contractor is orally directed to proceed with the delivery of services, if it occurs before the contract start date specified by the contract or before contract approval by State officials as required by applicable statutes and rules of the State of Tennessee.

7.4   RFP and Proposal Incorporated into Final Contract

This RFP and the successful proposal shall be incorporated into the final contract.

7.5   Contract Monitoring

The Contractor shall be responsible for the completion of all work set out in the contract. All work is subject to inspection, evaluation, and acceptance by the State. The State may employ all reasonable means to ensure that the work is progressing and being performed in compliance with the contract. At reasonable times, the State may inspect those areas of the Contractor's place of business that are related to the performance of the contract. If the State requires such an inspection, the Contractor shall provide reasonable access and assistance.

7.6   Contract Amendment

During the course of this contract, the State may request the Contractor to perform additional work for which the Contractor would be compensated. That work shall be within the general scope of this RFP. In such instances, the State shall provide the Contractor a written description of the additional work, and the Contractor shall submit a time schedule for accomplishing the additional work and a price for the additional work based on the rates included in the Contractor's Proposal to this RFP. If the State and the Contractor reach an agreement regarding the work and associated compensation, said agreement shall become effective by means of a contract amendment. Any such amendment requiring additional work must be mutually agreed upon by the parties and signed by the Contractor and the head of the procuring state agency and must be approved by other State officials as required by State laws and regulations. The Contractor shall not commence additional work until the State has issued a written contract amendment and secured all required approvals.

The *pro forma* contract (provided in the following pages) contains capitalized and bracketed items that shall be replaced with appropriate information in the final contract.

**CONTRACT
BETWEEN THE STATE OF TENNESSEE,
DEPARTMENT OF EDUCATION
AND
[CONTRACTOR NAME]**

This Contract, by and between the State of Tennessee, Department of Education, hereinafter referred to as the "State" and [CONTRACTOR LEGAL ENTITY NAME], hereinafter referred to as the "Contractor," is for the provision of Statewide Student Management Software, as further defined in the "SCOPE OF SERVICES."

The Contractor is [AN INDIVIDUAL / A FOR-PROFIT CORPORATION / A NONPROFIT CORPORATION / A SPECIAL PURPOSE CORPORATION OR ASSOCIATION / A FRATERNAL OR PATRIOTIC ORGANIZATION / A PARTNERSHIP / A JOINT VENTURE / A LIMITED LIABILITY COMPANY].

The Contractor's address is:

[ADDRESS]

The Contractor's place of incorporation or organization is [STATE OF ORGANIZATION].

A.   SCOPE OF SERVICES:

SSMS FUNCTIONAL REQUIREMENTS

A.   Functionality

A.1	General
A.2	Security
A.3	District Calendars
A.4	School Calendars
A.5	Student Demographics
A.6	Enrollment/Transfer/Withdrawal
A.7	Master Scheduling Pre-registration and Tallying
A.8	Master Schedule Building
A.9	Master Scheduling Student Assignment
A.10	Master Scheduling Finalize Schedule
A.11	Attendance
A.12	Grades
A.13	Graduation Requirement
A.14	Testing/Assessment
A.15	Discipline
A.16	Transportation
A.17	Health
A.18	Exceptional Student Education (ESE)

SECTION A: SCOPE OF SERVICES AND DELIVERABLES (FUNCTIONALITY)

This section describes the services and deliverables for the Statewide Student Management software that will be utilized by the Department of Education and the local school districts of Tennessee. Following are the different categories of functionality that must be present in the software and a detailed description of the requirements for each category.

A.1 General

This category gives a description of the general requirements of the Statewide Student Management software including the ability to interface with the current Education Information System. Also covered are other functions including error messages and query tools. The functionality for this category is as follows:

a.   Allow SDE to produce extract files to update the EIS system with all additions, deletions, and changes to meet Tennessee State Department of Education requirement (*See EIS Manual at www.state.tn.us/education/sm_menu.htm*).

b.   User-friendly (i.e. Graphical User Interface)

c.   Ability to set up user-defined fields for all areas

d.   During data entry, ensure that all mandatory data items are captured and prevent acceptance of inconsistent or invalid data

e.   During data entry, provide drop down menus or user defined selection lists

f.   During data entry, provide users the ability to default values

g.   Display a meaningful error message when system errors or/and data entry errors are detected

h.   Ability to interface with SDE directory (licensure database)

i.   Maintain SDE defined years of data online. (i.e. users are able to access and modify previous years' data)

j.   Query on any field in the SIS database (Discover)

k.   Ability to perform search and sort on any and all data. To include single or combination item
      a.   search and sort and the ability to use a wild card search.

l.   Compatible with Macintosh OS 8.1 or higher running Internet Explorer 5.0 or higher and Windows NT 4.0 or higher running Internet Explorer 5.5 or higher.

m.   The application must be a state-level centralized web-based system that can support all 136 school districts on a single database. No workstation client software or code, other than the browser, should be required to run the application. The application and the database must each reside on a separate server. The application and database servers can run in either a Windows or a Unix environment.

n.   The application must be designed to provide data redundancy through mirroring the application and data at a backup location.

o.   Monitoring and tuning of database and application performance and response time must be provided to ensure network and server capacity are efficiently utilized.

A.2 Security

This category gives a description of the security features of the Statewide Student Management software including setting up of user groups and data encryption that adheres to the current Tennessee Information Resources Architecture. The security functionality in this section is as follows:

a.   Provide multiple access level by fields, data value and type of information. (Levels are to be determined by LEAs)

b.   Ability for each LEA to have a security administrator responsible for maintaining field level security.

c.   User authentication will be by user-id and password, assigned by LEA security administrator. LEA security administrators will be assigned by State security administrator.

d.   Provide users the ability to export data in .xls or comma delimited .txt files.

e.   Fully encrypt all data sent via internet using 128 bit secure socket layer per the current Tennessee Information Resources Architecture.

f.   Maintains an audit trail or change history (i.e. who, when and what).

g.   Allow the districts the ability to define their own user groups for security purposes, i.e. Special Education group only are allowed to view student special ed information, Vocational Education group only are allowed to view vocational ed student information.

h.   Automatic logoff after predetermined amount of time where there is no activity.

A.3 District Calendars

This category describes the Statewide Student Management software's functionality for district calendars including calendar requirements and modifications. The functionality for the category is as follows:

a.   Allows for district to have multiple active district calendars

b.   Applies rules and provides edits to meet SDE district calendar requirements. (*See EIS Manual at www.state.tn.us/education/sm_menu.htm*).

c.   Allows for modifications to district calendars

d.   Ability for districts/schools to flag any or all district calendar record types by calendar number to be extracted for upload to EIS even when no changes have been made to the district calendar

e.   Allow only valid events (EIS Manual, Appendix A – Calendar Event/Designated Day Types)

f.   Edit for a minimum of 180 student days

g.   Edit for a minimum of 200 calendar days

h.   Edit for a minimum of 10 teacher vacation days

i.   Edit for a minimum of 5 in-service/in-service optional days

j.   Edit for a minimum of 1 teacher/parent conference days

k.   Edit for a maximum of 4 discretionary days

l.   Edit for a maximum of 13 stockpile days (total of professional development and inclement weather)

m.   Produce the 200 Day Accountability report by district calendar

n.   Query showing the 200 Day Accountability data with calendar event details by district calendar

A.4 School Calendars

This category describes the functionality for school calendars including calendar requirements and modifications. The functionality for this category is as follows:

a.   Allows for a school to have multiple active school calendars (instructional program)

b.   Create school calendar from a district calendar

c.   Allows for modification to school calendar

d.   Applies rules and provides edits to meet SDE school calendar requirements. (*See EIS Manual at www.state.tn.us/education/sm_menu.htm*).

e.   Ability for districts/schools to flag any or all school calendar record types by school calendar number to be extracted for upload to EIS even when no changes have been made to the school calendar

f.   Edit for a minimum of 180 student days

g.   Edit for a minimum of 200 calendar days

h.   Edit for a minimum of 10 teacher vacation days

i.   Edit for a minimum of 5 in-service/in-service optional days

j.   Edit for a minimum of 1 teacher/parent conference days

k.   Edit for a maximum of 4 discretionary days

l.   Edit for a maximum of 13 stockpile days (total of professional development and inclement weather)

m.   Do not allow a individual school to indicate stockpile professional development option if the district stockpiles professional development (this option is only if the district does not stockpile professional development)

n. Create 9 funding periods for reporting to SDE (each funding period should contain 20 instructional days)

o. Adjust funding period begin and end dates for changes to calendar, periods 1-8 must have 20 days, period 9 may be reduced for valid changes

p. Produce the 200 Day Accountability report by school calendar

q. Query showing the 200 Day Accountability data with school event details and the begin and end dates by funding period by district calendar

r. Ability to define and utilize multiple time intervals for reporting (i.e. daily, month-to-date, month-end, quarterly, year-to-date, annually, working days, semester, weekly).

A.5 Student Demographics

This category describes the functionality of the Statewide Student Management software pertaining to student information. Included in this section are student classifications and student historical information. The functionality for this section is:

a. Student Demographic Data
   - Full student name (first name, middle name, last name, suffix)
   - Student nickname
   - Social Security Number (required unless Student PIN is provided)
   - Student PIN (should only be used if Social Security Number is not available and then it is required)
   - Gender, Date of Birth, Birthplace, multiple birth
   - Home Language
   - Ethnicity
b. Student previous Social Security Number
c. Student previous name (first name, last name)
d. Student Previous PIN

e. Ability to determine number of days enrolled during 20-day period, number of days attended in
   20-day period

f. Title 1 instruction being administered, title 1 support services being offered

g. Preferred language of communication

h. Track student's "living with" information
   - Add multiple addresses for student, parents, or/and guardians

- Parent/guardian/contact relationship code
- Parent/Guardian/Contact Title
- Address type (I.e., residential and mailing)
- Ward of State Indicator

i. Separate home, work, fax, pager, cell and emergency telephone number for each contact and the contact's preferred method of communication
   - Track student's emergency contact, family doctors, joint custody and homelessness
   - Email of each contact
   - Flag for parent/guardian not having rights to see student (restraining order, parent pickup rights)

j. Track whether a student's parents have invoked their right to keep student information private (Privacy Status)

k. Track information (type of services to be received) for students with 504 plan

l. Allow student to have multiple current classifications and maintain classification history with begin and end dates for the school year

m. Maintain student standard day and history including begin and end dates for each student standard day

n. Maintain student history for a SDE defined number of years after graduation

o. Track Homeroom

p. Refusal to release Social Security number indicator (Note use of SSN or student ID number)

q. Track program of Study

r. Section 504 start date, end date, and accommodation fields (codes)

s. Student membership information
   - Book Assignment (Include textbook indicator for lost, returned or damaged books)
   - Locker assignment
   - Parking eligibility and decal number
   - Off-Campus lunch eligibility
   - Parental consent for student Internet access
   - Sports participation (report to State)

t. Scholarship Data

- Merit Scholar
- Academic scholar
- Gold Seal Recipient
- National Merit/Achievement/Hispanic Scholar

u. Provide flags for special student circumstances (e.g., medical alert, guardian alerts)

v. Allow for student to be flagged as ineligible for funding, and maintain history of status

w. Track student grade assignment and maintain history with grade begin and end dates for school year

x. Ability for districts/schools to flag any or all student record types by student Social Security Number or PIN Number to be extracted for upload to EIS even when no changes have been Made to the student's data

y. Do not allow both a student SSN and PIN number but do allow PIN number to be changed to SSN at a future date

z. Ability to add user-defined fields for student demographics

aa. Report showing Student Demographic Information

bb. Generate student reports to multiple parents with different mailing addresses

cc. Report of Students by Last Name

dd. Report of Students by Gender

ee. Report of Students by Student ID

ff. Report of Students by Town/Country Code

gg. Report of Students – Parent/Guardian

hh. Report of Students – Telephone

ii. Report of Household Addresses by Student

jj. Report of Student List by Billing Household

kk. Student List by Residence Household

ll. Student Ethnic/Race Report by Ethnic/Race Code

mm. Student Ethnic Race Report by Student

nn. Ethnic Tallies by Grade

oo. Address List Sorted by Street

pp. Alpha List All Students Sorted by Grade Level

qq. Alpha List by Guidance Counselor

rr. Birthday List by Specified Month

ss. Report of Ethnic Breakdown by Grade

tt.   Report on ethnic distribution

uu. Students Standard Data Report

vv.   Student Address Labels

ww. Student Parking Sticker Report

xx. Emergency Contacts by Student Report

yy. Student Locker Listing

A.6 Enrollment/Transfer/Withdrawal

This category involves the enrollment, transfer and withdrawal of students. The functionality for this section includes the ability to roll student data forward from previous school years and how to handle reenrollment of students. The functionality for this category is as follows:

a. Allow for students with dual enrollments, home school and service school for students receiving services outside of their home school

b. Roll student's demographic data from previous school year to the new school year and generate a "E" enrollment on first day of attendance for all returning students at their designated normal progression school (will not roll data at former school)

c. Ability for districts/schools to select fields to be rolled over from previous year

d. Permit a student enrolled as an "E" on the first day of attendance to be withdrawn on first day of attendance

e. Track student's school assignment, grade, reason for entry, assignment date, homeroom etc.

f. Track services for students at more than one school, student taking classes at school other than home school (service school enrollment)

g. Warn or lock out enrollment of a student with active suspension or expulsion

h. Support automatic grade promotion process (i.e. from 4th grade to 5th grade) unless specifically marked in system to hold student back or student failed to fulfill requirements for next grade level.

i. Able to produce enrollment package (e.g. demographic information, class schedule)

j. Report on primary school and additional school

k. Transfer student record from one school to another within the district. Carry forward user-defined information (ethnicity etc.) when a student is transferred from one school to another within the district

l. Track student withdrawal information (e.g. withdrawal reasons, withdrawal dates, comments etc.)

m. Cancel student withdrawal

n. Reassign classes to student upon re-enrollment during the same school year

o. System should not allow student PIN Numbers to be re-assigned, assigned to more than one student.

p. Check transfer records for immunization and health record flags

q. Check student information to ensure the student is not already actively enrolled (using name, SSN or PIN) at another school statewide

r. Ability to print list of transfer students

s. Enrollment/Transfer/Withdrawal Reporting
    New Student Enrollment Report
    Students Dropped from Enrollment Report

Student Re-entered Report

Report on inactive students showing their withdrawal information

Enrollment Codes Report

Report on active students for a user specified time range

Report on students withdrawn during a user specified time range by withdrawal codes

Report on enrollment counts by enrollment codes

Report on currently active students by school

Re-entry Codes Report

Withdrawal Codes Report

Report of Age in Grade Level

A.7 Master Scheduling Pre-registration and Tallying

This category describes the functionality for master scheduling pre-registration including course catalogs. The functionality for this category is:

a.   Maintain centralized District Course Catalog (i.e. all class offerings district wide in a centralized catalog).

b.   Maintain credit weight by course in the District Course Catalog

c.   Maintain whether a course can be taken pass/no pass in the District Course Catalog.

d.   Add and inactivate courses from District Course Catalog.

e.   Maintain Local Course Catalog by school

f.   Ability to add special courses which are not published but are in approved table for the school or District

g.   Add and remove courses from Local Course Catalog by selecting and deselecting from District Course Catalog

h.   Specify whether a course is offered in fall, spring, summer or a combination of the three

i.   Specify whether a course is contained in the college core curriculum at the State, district and school level.

j.   Produce a course roster report

k.   Allow each individual school to flag those courses in their Local Course Catalog which are available to all students district-wide (rather than available only to students within that school).

l. Produce personalized list of suggested course election for a student based on the course offerings, student's graduation requirements, student's special needs (e.g. Individual Education Plan, Bilingual/ELL etc.), credits earned on the student's transcript, and student's current schedule. The suggested course election should list only those courses available to the individual student. For areas where the student can choose between multiple courses, each course should be listed.

m. Provide for global course change/add/delete/replace on the suggested course elections based on global searches. The system should allow the user to select a group of students and make changes to the suggested course elections for all students within the selected group.

n. Specify student preferences for alternative electives (i.e. during scheduling, the system will attempt to schedule student with his or her first choice elective, but if not possible attempt to schedule for his or her second choice etc)

o. Produce warning message when the user attempts to elect a course for a student that the student has already passed, even if the student passed only one semester of a two-semester course.

p. Produce warning message when the user attempts to elect a course for a student that the student is currently taking.

q. Produce warning message when the user attempts to elect a course for a student that the student is ineligible to take or is missing prerequisite(s).

r. Identify whether a course request on a student's course election requires special Ed service. The system will use this data to determine how many Special Ed sections are required and to schedule the student into a Special Ed section.

s. Identify for each course request on a student's course election whether the student requires bilingual/ELL/alternative instruction. The system will use this data to determine how many bilingual/ELL/alternative instruction sections are required and to schedule the student into the appropriate section.

t. Ability to create a 4-year plan for student scheduling (University Track)

u. Provide online tally report to show the total number of course requests for each course updated real-time. Provide drill-down capability from the tally into the course elections that make up the tally.

v. Automatically determine # of courses and sections required, based on course election.

A.8 Master Scheduling Build

This category gives a description of the ability of the Statewide Student Management software to build a master schedule. Included is the ability to maintain multiple calendars and different kinds of calendars for a school. Block scheduling is also covered under this category. The functionality for this category is:

a. Maintain a list of schools and related data (e.g. school ID, address etc.)

b. Maintain multiple school calendars for a school.

c. Support different kinds of school calendars (including: 9 weeks, quarters, trimesters, and semesters, year-round).

d. Support different numbers of periods per day and week (i.e. 4 periods/day, 8 periods/day, rotating schedules etc.) The system should allow the user to define start and end times for periods by school calendars

e. Ability to schedule lunch period.

f. Allow for multiple class period durations at a school.

g. Set a maximum size parameter for each section of a course.

h. Maintain a list of rooms by school related room information (type of room)

i. Set a maximum size parameter for each room. The system should not exceed the lesser of either the room maximum or the section maximum.

j. Specify bilingual/ELL/Alternative language sections and the language of instruction for K-12

k. Specify special Ed sections (i.e. types of special Ed service).

l. Ability to specify special Ed course codes with multiple grade levels

m. Set maximum number of subjects each teacher can teach. Each teacher can teach a predetermined number of classes. The system should allow the user to define on a teacher-by-teacher basis how many classes each teacher can teach.

n. Assign teachers to specific courses based on endorsements/certifications.

o. Assign teachers to specific sections based on endorsements/certifications. (e.g. bilingual, ELL sections)

p. Assign multiple teachers to one section (i.e. team teaching). For example, an English I section may have an English teacher and a Special Ed teacher. The system should show both teachers on the master schedule and on the student programs.

q. Specify valid periods by courses or by section if applicable. Some periods defined in the system are only valid with certain courses. System must allow user to note what periods are valid with

each course or section. If no values are assigned, the system should assume that the course could be taught during any period. This includes assigning valid lunch periods.

r.   Roll-over master schedule from previous year and make modifications if appropriate

s.   Specify non-instructional teacher periods (preparation, counseling, duties) by teacher by school.

t.   Facilitate block (multiple-period class meetings) scheduling. (i.e.. an English class might meet for two consecutive periods on Monday and Wednesday and Math class for two consecutive periods on Tuesday and Thursday rather than for a single period each day. For Fridays the blocked classes may meet one period each or meet alternating weeks for two periods each week) the system should support multiple period classes up to at least four consecutive periods as well as non-consecutive periods. The system should allow the user to specify which days in the cycle that the sections will meet.

u.   Facilitate block scheduling (e.g. combining multiple number of x weeks sub-courses to make a semester or a year-long course where students in each sub-courses will rotate around - two semester courses such as Government and Health are blocked together to make a year-long course for scheduling purpose).

v.   Facilitate scheduling for teams or family style teaching (students from the same team receives teaching from the same group of teachers for core classes. For electives, students are able to receive teaching from non-team teachers)

w.   Assign teachers to teams for family style teaching. If teachers are assigned to a team, the system is able to recognize the team and is able to give the teachers in that team a common prep period for planning purposes.

x.   Compare the number of course requests to seats provided on the master schedule (as determined by the total sections multiplied by the maximum number of seats per section).

y.   Allow user to perform "what-if" analysis by running the master schedule builder multiple times, changing parameters each time. The system should save each master schedule and allow the user to choose which one to use as the master.

z.   Sort master schedule according to any of the fields on the master schedule. Users should be able to print the master schedule according to how they have sorted it (i.e. type of credit, teacher, or students).

aa.   Display district and school master course summaries

A.9 Master Scheduling Student Assignment

This category describes the software functionality pertaining to assignment of students to the master schedule. It includes priorities for scheduling of students and handling of scheduling conflicts. The functionality for this category is:

a. Prioritize students for scheduling based upon a random algorithm. System should not prioritize students according to name or ID.

b. Ability to prioritize scheduling of students based on graduation requirements.

c. System will allow scheduling priorities to be set based upon user defined criteria, including: grade level, graduation requirements, special course requirements, and predecessor course requirements.

d. Assign students to particular sections.

e. Assign students to a specific teacher on a teaching team.

f. Ability to scan course requests.

g. Freeze certain sections or courses during the master schedule build process

h. Manually close a section so that no students can be scheduled into that section.

i. Provide mechanism to increase the likelihood that a section will fill (increase its priority).

j. Allow for pullout classes of different lengths than the standard duration, or the ability to change the class duration.

k. Support section leveling equity based on number of students, gender, ethnicity, special Ed, etc.

l. Ability to notify the student's home school of summer school grades and graduations.

m. Treat students with "open" periods as irresolvable conflicts

n. Allow the option of exceeding section maximums when this is the only way to avoid an irresolvable conflict. The system should allow the user to specify by how many or by percentage the system can exceed the section maximum. The system should issue an online warning that can be overridden when this occurs. In contrast with the requirement that prevents section maximums from being exceeded during the proof and final runs, this requirement exists to ensure that a schedule can be produced for a student under any circumstances once school starts.

o. Provide an on-screen report indicating section size maximum, seats filled, and seats remaining by section.

p. Produce an on-screen conflict matrix without printing a report. The system should also allow the user to drill down into the count to see the names of each student requesting the conflicting courses.

q.   Provide conflict matrix of each student with irresolvable conflicts, indicating all courses elected and corresponding master schedule class possibilities, and flag master schedule classes that are filled.

r.   Roll data for next year's scheduling purposes and ability to update new or changed data. Ability to delete students who withdraw prior to the last day of school from the rolled data.

s.   Allow minute by minute scheduling of students.

t.   See open classrooms information for each period online (i.e. classrooms unoccupied, number of seats open in each period, etc.)

u.   See on-screen and print report by room number of all sections scheduled into each room on the master schedule. For combined sections, both sections should be printed.

v.   Provide online, real-time access to all queries and reports related to master scheduling at each school (i.e. individual schools should be able to run master schedule build and print schedule master at own sites).

w.   Assign book to courses (I.e., title of text adopted for course)

A.10 Master Scheduling Finalize Schedule

This category describes how the Statewide Student Management software will finalize the master schedule. Topics included in this category are layouts of student schedules and the handling of student schedule changes. The functionality for this category is:

a.   Purge all versions of the master schedule except for the one used for final run (i.e. keeping "what if" queries and revert to a prior version if newer scenario does not produce better success percentage)

b.   Custom design layout of the student schedules, detailing the courses and sections each student will be taking for each period per cycle day.

c.   Custom design layout of the teacher schedules, detailing the courses and sections each teacher will be teaching for each period per cycle day.

d.   Produce class rosters based on subject, course, teacher, or student language category

e.   Report on those students who are enrolled at a school without valid schedules.

f.   Provide for global course change/add/delete/replace on student schedules based on global searches. The system should allow the user to select a group of students and make changes to the student schedules for all students within the selected group.

g.   Maintain an audit trail/change log that specifies the timestamp, user, and program when changes are made to an individual student schedule. The system should also track reason for the change.

h.   Automatically remove the student from all of his/her scheduled classes and reduce the class sizes, as well as create teacher notifications when student is withdrawn from a school.

i.   Change teacher's grade and attendance books and class roster for both the old and the new course and section assignments when changing a course on a student schedule

j.   Recall the last valid schedule for a student if a student who transferred out of a school or was marked as No Show comes back to the school during the same school year. The system should allow the user to reschedule the student into those courses on the last valid schedule, if class size allows.

k.   Make available the schedule for the transfer student in the former school online for the new school to refer to when preparing the student's schedule in the new school, when both schools are in the same district.

l.   Check that minimum criteria (i.e. passing grade) for pre-requisite class is fulfilled before allowing enrollment to dependent class.

m.   Schedule "walk-in" or transfer students manually

n.   Weight Special Ed students when counting students in class size limit (i.e. SE student equals 1.5, 2.0, other user defined criteria)

o.   Ability to schedule before / after school classes (prior to 1st period or after last period)

p.   Ability to flag any or all class record types by local class number to be extracted for upload to EIS even when no changes have been made to the class data

q.   Student Schedule

A.11 Attendance

This category includes the functionality of the software for attendance purposes. Included in this category are tracking of attendance and teacher roles pertaining to attendance. The functionality for this category is:

a.   Support different types of school calendars (i.e. quarters, trimesters, semesters, full-year)

b.   Support different numbers of periods per day and week (i.e. 4 periods/day, 8 periods/day, rotating schedules etc.) The system should allow the user to define start and end times for periods by school calendars.

c. Take attendance by period-by-period, by half day (AM/PM) and by day.

d. Allow for comments concerning attendance.

e. Require teacher verification that attendance has been taken.

f. Enter absences by teacher online

g. Ability to scan attendance

h. Update attendance immediately. The system should allow reporting on attendance by the following period.

i. Do not allow teachers to change attendance data once it has been submitted for the day.

j. Ability to track attendance, period by period, from service school to primary school.

k. Track absence type or reasons.

l. Ability to generate a letter of absences to parents.

m. Track tardy (excused, unexcused and time in).

n. Ability to print 5/10 day letters automatically or manually (switch).

o. Pre-excuse attendance (e.g. a student is away for extracurricular activity)

p. Define student groups (for example - marching band members) for pre-excused attendance; be able to flag early dismissal for all members of the group.

q. Maintain students' absence history. The system should allow the users to specify how much historical data needs to be maintained (i.e. at least two years etc.)

r. Query Average Daily Membership by teacher, class, student or homeroom.

s. Compute Average Daily Attendance Rate
    - If student attended school less than half day the student gets an absence, if student attended school half a day (3 hours 15 minutes) then the student gets full-day attendance.
    - Average Daily Attendance Rate = Attendance in Days by Student /district Enrollment Days.

t. Compute Average Daily Membership - Average Daily Membership = Membership in Days by Student /district Enrollment Days.

u.	When a student transfers schools or courses, attendance information is still available.

v.	Flag students with different levels of attendance problems

w.	Track attendance records and history of students with different levels of attendance problems to social workers

x.	Ability for Districts to set up criteria for perfect attendance.

y.	Record information of students to Truancy Center (white card information)

z.	Maintain attendance totals historically by student

aa.	Track early dismissal including reason and time dismissed

bb.	Track homebound students

cc.	Allow for Special Ed students to be fully serviced at another location other than the home school.

dd.	Ability to track total class minutes for a student that is in and out of school during the day to determine if he is considered present for the school day.

t.	Automatically notify appropriate recipients when a student reaches a user-specified number of absence (e.g. 10 unexcused school days)

u.	Generate Absence Letters based on a user-defined number of absences. (e.g. 10 unexcused school days)

gg.	Query students with more than user specified consecutive unexcused absent school days or periods

hh.	Report student attendance by teacher, student demographics, semester, language category, etc.

ii.	Notify Student Services when students under 18 are non-compliant with attendance policy

jj.	Notify Tenn. Dept of Safety (DoS) when students under 18 are non-compliant with attendance policy or passing grades are not achieved. Generate document/form for DoS.

kk.	Notify Tenn. Dept of Safety when students under 18 are back in compliance with attendance policy or passing grades are achieved. Generate document/form for DoS.

ll.	Reports :

- Absentees by Homeroom Report

- Absentee Report

- Phone Master Absentee Report

- Student Attendance Report

- Absentee Codes

- Manual Attendance Roster

- Students not in Attendance Report

- Count of Students in First Period Classes Report

- Actual Enrollment Count Sorted by Course Code and Period

- Attendance: Perfect Attendance Report

- Attendance: Excessive Absences Report

- Attendance: End of Fourth Marking Period Report

- Daily Attendance Report

- Perfect Attendance Whole Year

- Twenty Day Absentee Report

- Twenty Day Attendance Report by First Period

- Attendance All Classes Report

- Report of Attendance: Aggregate/Averages

- Compulsory Attendance Program Report

A.12 Grades

This category describes the grading portion of the Statewide Student Management software. This category includes GPA calculations, identification of student courses, and student report cards. The functionality for this category is:

a.   Specify grades per class (i.e. numeric and alpha, Incomplete, Passing, No Grade, Withdrawn, etc.)

b.   Specify qualitative grades for Elementary students (i.e. observations).

c.   Specify Honors if applicable

d.   Specify Honor Roll requirements per grade level

e.   Identify Repeated Courses

f.   Identify all attempted courses

g.   Identify courses taken during Summer Sessions

h.   Specify and maintain transfer credit (i.e. credits earned from out of district schools).

i.   Provide a drop-down menu for selecting credit value of courses.

j.   Show the district and school from which transfer credits were accepted and include in the student's transcript.

k.   Allow the teacher class report to follow a student when assigned to another teacher.

l.   Provide multiple data entry tools for grade marking (e.g. online, bubble sheets, spreadsheets etc.)

m.   Ability to update grade book and submit when complete.

n.   Approved personnel can modify grades (for an active student, the student's current school is the keeper for the student record and for an inactive student, the student's most recently attended district school is the keeper of the student record).

o. GPA Calculations
   - Specify calculation of semester GPA (i.e. semester GPA calculation is based on A=4, B=3, C=2, D=1 F=0) for regular classes and additional 0.2 honors differentials is added for each passed honor classes.
   - Specify calculation of cumulative GPA (i.e. GPA calculation is based on A=4, B=3, C=2, D=1,

F=0) for regular classes and additional 0.2 honors differential is added for each passed honor's class. However only a maximum of 16 honor's classes can be counted towards the cumulative GPA calculation. Maximum cumulative (GPA is 4.4).

- Ability to identify GPA scale to be used. (Long Avg., etc.)
- Allow for GPA calculation using simple average (1-100 point scale).
- Convert GPA from 100 point system to 4.0 point system.
- Ability to specify rounding rules for GPA calculations.
- Ability to exclude a course from a student's GPA by course number.
- Calculate overall unweighted GPA using 4.0 point system.
- Calculate unweighted GPA using 4.0 point system in the college core curriculum.

p. Calculate semester class ranking based on semester GPA.

q. Calculate cumulative class ranking based on cumulative GPA, earned credit and # of years in district

r. Customize elementary report cards based on grade level

s. Simple instructions for set-up and operation

t. Allow teachers to input letter or numeric grades from the classroom

u. Allow teachers to compute grade by points or percentages

v. Allow teachers to determine the weight of individual assignments and/or categories

w. Compile teacher grade analysis for individual assignments

x. Allow teachers to use "S", "N" or check marks as performance standards

y. Sort classes by name, gender, ethnicity, and student number

z. Allow teachers the ability to work from school or home

aa. Allow teacher to name each assignment individually

bb. Allow teacher to mark an assignment as exempt for a particular student

cc. Allow for extra credit

dd. Ability to import and export data to and from district sources

ee. Allow for additional comments:
   - Allow for individual comments that could provide continuous history of the child's academic progress
   - Additional comments from a user defined list
   - Allow additional room for comments about grades to be entered

ff. Allow special grade codes (I.e. NB = No Book)

gg. Allow flexibility to change grades, averages and drop grades

hh. Allow flexibility on report card format and data

ii. Ability to set sort flags for report card distribution

jj. Flag notification of missing or incomplete grades

kk. Auto-fill grades, i.e. assign same grade to an entire class of students; be able to toggle on/off for auto-fill

ll. Ability to scan grades

mm. Query students who are below and above a user-specified GPA or grade by single or multiple criteria (i.e. grade level, teacher, subject, alphabetically, etc).

nn. Generate Student Reports
   - Generate Progress Reports on-demand for one student or entire class of students.
   - Generate Deficiency Reports on-demand for one student or entire class of students.
   - Generate Grade Reports for user-specified grade reporting period (e.g. a grade report may include 9 week progress, final exam grade and final course grade)
   - Generate reports for failing students in order to properly notify and verify with student's parents/guardians.
   - Create grade reports by student and class for individual assignments
   - Report of Students-GPA
   - Grade Type Listing by Category
   - Grade Type Listing by Type
   - Grade Code List by Code
   - Honor Roll Criteria Report
   - Grade Verification Report
   - Report of Students Missing Grades
   - Alphabetic Honor Roll List
   - Class Rank Report by Class
   - Semester Grade Roster
   - Tally of Grades by Instructor

- Transcript Reports
- Class Rank List Sorted by GPA Order
- Failure Letter Fourth Marking Period
- Failure Lists First Semester- Produce Report Cards
- Produce Report Card Verification Sheet

oo. Produce Transcript Labels

pp. Produce letters to the parent giving notification of courses the student is in danger of failing

qq. Produce Transcripts showing course, course location, subject, grade, credit, Honors, Repeated Course, Summer Session, class rank, cumulative GPA, semester GPA, earned credit, credit analysis and results by year (grade) by student. Print Unofficial Transcripts and Official Transcripts by student, by grade or by school.

rr. Produce Report Cards for Students

A.13 Graduation Requirement

This category describes the graduation requirement functions that will be available in the Statewide Student Management software. This category includes the different diploma types and credit requirements. The functionality for this category is:

a. Track whether a student graduated (Y, N, or blank), diploma received (Y or N), and future plans (i.e. 2-year college, 4-year, etc.)

b. Specify overall credit requirements by subject by grade for graduation.

c. Specify credit requirements by subject by grade.

d. Maintain multiple versions of graduation requirements by school or by year.

e. Specify a version of graduation requirements by student.

f. Ability to specify diploma type by student (Regular, Special Education, GED).

g. Default diploma type to Regular Diploma.

h. Track early withdraw code vs. early withdraw for GED graduates.

i. Specify calculation of total earned credits. (i.e. total earn credits calculation is based on the sum of the credit weighting for all applicable courses).

j. Track student progress towards graduation (i.e. credit analysis - credit required, credit obtained and credit remaining).

k. Track English and Spanish versions of Tennessee High School Competency Exam results (i.e. Composition, Language Arts, Reading, Mathematics, Social Studies, Science)

l. Allow for individual course waivers

m. Verify that credits and attendance are achieved in order to fulfill graduation or promotion requirement

n. Create scholarship warnings Report

o. Produce honor roll and Straight "A" letters

p. Students by Degree Type Report

q. Students by Graduation Year Report

A.14 Testing/Assessment

This category describes the testing and assessment functionality of the Statewide Student Management software. It includes importing of test results and testing and assessment history. The functionality for this category is:

a. Import test results for tests including, but not limited to, TerraNova, Reading Assessment (English and Spanish), Writing Assessment, National Assessment of Education Progress (NAEP), High school Competency Exam, Gateway, et al.

b. Gateway weighting to include verification that attendance and credits are achieved in order to fulfill promotion or graduation requirements.

c. Ability to upload test results for TerraNova at State level, not at districts or schools.

d. Ability to pull faculty and student data from SDE database for State testing.

e. Track in-house developed tests

f. Analyze improvement/progression for students and programs. The system should facilitate analysis for a single student, grade, school, cluster, program, or English proficiency category.

g. Change as assessment requirements change (i.e. a new test is developed and results need to be tracked)

h. Maintain test and assessment history

i. Set exclusion flags on students who may be excluded from having to pass a course or test

j. Provide 'Free and Reduced Lunch' indicator for testing

k. Provide history of cumulative testing files by student

l. Record tests such as TCAP, Gateway, ACT, PSAT, AP scores, etc.

m. Create test results by class to send to teachers

n. Collect and record various types of test scores (e.g. Stanine, raw, % scaled, standard deviation)

o. Online access to test scores

p. Maintain at least 3 years test data

q. Produce a report that compares course grades to commensurate TCAP assessment results, by teacher

r. Create report when a student does not meet requirement for the grade level

s. Report on student test information at any level. (E.g. multiple test by student, grade, school, language category, etc.)

t. Classify or group test info by parameters (i.e. a content standard in math) and produce a report by that standard

A.15 Discipline

This category describes the features of the Statewide Student Management software pertaining to discipline including disciplinary actions and offenses. Also covered are 'zero tolerance' rules. The functionality for this category is:

a. Track disciplinary offenses and actions by student

b. Allow disciplinary action duration to cross school years

c. Categorize type of offenses (valid codes are in EIS Manual)

d. Ability to add disciplinary reasons by district, in addition to the State approved reasons, and convert to a valid State reason code

e. Track type and length of student consequence(s)/disciplinary intervention(s) (e.g. in-school suspension, community service, short term suspension, long term suspension, expulsion etc.) by student

f. Allow district the option of moving or not moving disciplinary data upon transfer within district

g. Do not allow more than 10 days total of suspension for Special Education students per school year

h. Ability for a district to define a disciplinary infraction point system

i. Define types of consequences/disciplinary interventions by school

j. Track discipline referrals by teachers, department, date, etc.

k. Apply disciplinary actions to attendance automatically (mark as absent)

l. Maintain student's disciplinary history and produce report ("Rap sheet")

m. Control access to student's disciplinary records (i.e. only approved personnel from the school the student is currently attending should be able to see student's disciplinary history records)

n. Query students suspended, expelled, or remanded by type of offense and/or date

o. Allow alternative schools to be able to indicate half-day scheduling (i.e. morning/afternoon) that is used in continuation schools

p. Track if an alternative school student has received his/her GED

q. Validate student birthday vs. action code to determine if action is allowed for age

r. Track expulsions
   - Ability to indicate an expulsion was due to zero tolerance
   - Indicate zero tolerance expulsions on End of Year report

s. Build a conduct/incident history tracking file for juvenile offenders, I.e. probation officer information, DJJ involvement and contact information

t. Ability to change begin and end dates for zero tolerance offenses

u. Allow for additional zero tolerance rules (bus suspension, etc.)

v. Generate incident tracking number

w. Ability to email notifications for teacher / student complaints using the tracking number for future reference

x. Ability to insert comments into student's discipline incident or history report

y. Note primary and secondary offenses

z. Ability to indicate "Child in State Custody"

aa. Generate warnings for Special Ed students Disciplinary Actions

bb. Generate notifications to student's original school (administrator) regarding the student's progress at alternative schools (grades, attendance etc.)

cc. Ability to print incident report immediately in security office

dd. Ability to automatically notify parents of discipline events: printed letter, email, integration to IVR system, etc.

ee. Individual Student Discipline Profile

ff. Notice of Disciplinary Action

gg. Total Number of Suspensions and Expulsions for Current Year

hh. Discipline Counts by Code Excluding ISS

ii. Discipline Counts by Code for ISS

jj. Discipline Master Log

kk. Discipline Report Lists # of Occurrences per Day

A.16 Transportation

This category covers transportation features of the Statewide Student Management software. Topics include busing information and students' eligibility for transportation. The functionality for this category is:

    a.   Track whether students are taking buses to school or not.

    b.   Track whether students are taking buses to Vocational/Career Enrichment Center (CEC) or not

    c.   Track student's transportation information (eligibility and bus stop information)

    d.   Allow for multiple bus numbers for AM/PM

    e.   Track school zone when a student travels outside of the home school zone.

    f.   Track route, stop locations, pick-up time, drop-off time, and last revision date of a route (need to determine what this is for)

    g.   Track bus rider ship

    h.   Ability to mass change the bus number for all students assigned to a specific bus

    i.   Ability for schools to see route sheet

    j.   Print Transportation Roster by School

    k.   Print stickers with route information for students on first day of school (Elementary)

    l.   Busing Information by Student

    m. Students by Bus Number/Route

    n.   List of Bus Riders on Selected Bus

    o.   Track students bus eligibility. Track students by bus route, including students that decline to ride the bus.

    p.   Easily retrieve students' emergency contact information by transportation roster

A.17 Health

This category describes the health features of the Statewide Student Management software. This includes students' health information, immunization status, and emergency contact information. The functionality for this category is:

    a. Maintain student's health information including Medicaid, insurance, diagnoses, medication, health progress, vision, scoliosis, and hearing assessments, height and weight and blood pressure. (Follow HIPAA privacy rules)

    b. Track students' health concerns. Print list of students with special health needs.

    c. Track multiple immunization status (DPT, OPV, MMR, etc.) including immunization dates, conditionals, exceptions and immunity

    d. Track students' immunization process and alerts nurses when actions need to be taken (i.e. certain immunization needs to be taken in specified sequence and time frames. The system should help nurses ensure the immunization is taken in a timely manner)

    e. Change as immunization requirements change (i.e. a new kind of immunization is mandated by the state)

    f. Allow for accident tracking

    g. Limit health information only to qualified staff

    h. Allow for waivers based on health

    i. Health-related comments/instructions

    j. Alert nurses when a student's immunization data is incomplete

    k. List of students and their physicians

    l. Maintain a parent contact log for health-related issues

A.18 Exceptional Student Education (ESE)

This category describes the Exception Student functionality of the software. This includes Special Education programs and participation. The functionality for this category is:

    a. Track: Amount of Special Ed services being received, type of services being received, most recent evaluation date, additional services needed after exits (i.e. mental health services, vocational rehabilitation, developmental disabilities services, physical therapy, etc)

    b. Track a student's eligibility, capture start dates of S-team process, track days remaining to maintain timeline

c. Track ESE services a student is receiving.

d. Track service hours received and recommendations.

e. Track participation and time spent in general education.

f. Monitor the referral and assessment functions to ensure that specified activities are performed within established schedule requirements.

g. Maintain referral and assessment results for categorical programs linked to corresponding student information.

h. Search for appropriate instructors for assignment to a special service student based on location, qualifications, and availability.

i. Track IEP information to corresponding student information.

j. Record and compute IEP milestone dates and accomplishment information.

k. Assess performance/effectiveness of special services.

l. Track special situation students (i.e. at home students, hospitalized students, AEP (Alternative Education Placement) or those students with overlapping ESE needs.

m. Input and assess Special Ed goals on student IEP forms and progress reports.

n. Track ESE drop-out rate.

o. Compare each IEP recommendation for testing participation with the actual participation.

p. Provide ability to pull up a student's past ESE schedules even after he/she has been entered into a new school

q. Provide actual amount to time served in each ESE service

r. Identify students placed in Gifted.

s. Identify ESE programs available at specific schools

t. Project students to schools based on address and disability with override capability

u. Track participation in SE (active or inactive), and date of IEP

v.   Flag notification of three year evaluation time expiration

w.   Track interim students within the SE process, but not fully established

x.   Track handicapping codes

y.   Track history of evaluations and date of last evaluation

z.   Ability to make special scheduling considerations for SE students

aa.   Reserve number of seats in GE classes

bb.   Balance SE students across GE classes

cc.   Track case load and class size of SE teachers

dd.   Horizontal Student Lateral Report Sp. Ed.

ee.   Automatically notify appropriate recipients a predetermined period prior to IEP milestone
        dates coming due (i.e. via email alerts)

ff.   Automatically identify missing information (IEP components) and notify appropriate party

gg.   Produce ad hoc management reports showing all upcoming timelines for a
        district/school/teacher/child.

hh.   Generate IEP report cards for administrators, teachers, and parents on an ad hoc basis

ii.   Special Education Reporting:
   - June End of Year report
      • District Name
      • District Number
      • Age Group count (3-5, 6-22, total)
      • Grand total of all districts
   - New Enrollment report
      • District Name
      • District Number
      • Age Group count (3-5, 6-22, total)
      • Total count of ages 3-22
      • Total net enrollment for district
      • Ages 3-22 percentage to net enrollment

- Ages 6-22 percentage to net enrollment
  - Gender/Ethnic report
    - District Name
    - District Number
    - Report date
    - Male
    - Female
    - Total male and female by ethnic group
    - Total for districts
    - Grand totals for all columns
  - Child Count by System
    - District Name
    - District Number
    - Report date
    - Age 3-22 count by age per district
    - Totals by age group, 3-5, 6-11, 12-17, 18-21, 6-22, 3-22
    - Grand totals all columns
  - Option Count by District report
    - District Name
    - District Number
    - Primary and Secondary counts by option number (1-10) by district
    - Total primary count by district
    - Total secondary count by district
    - Total primary and secondary counts by district
  - End of Year Report
    - District Name
    - District Number
    - Special needs type
    - Count of students by special needs type
    - Total of all special needs type by district
    - Total of all special needs type for all districts
    - Total of all special needs type for all special schools and other State departments
    - Grand total of all special needs type
jj. Special Education Student data elements: (in a table maintainable by the State Department of Education)
  - Id Number, SSN, or PIN
  - Reason student is less than full service
    - Parent refusal
    - Medical reasons
    - Lack of personnel
    - Lack of appropriate facility
    - Lack of materials or equipment

- • Lack of appropriate transportation
- • Other
- • Drop out
- • Received Special Ed diploma/certificate
- Primary Disability
  - • Learning Disabled
  - • Mentally Retarded
  - • Gifted
  - • Speech impaired
  - • Language impaired
  - • Seriously emotionally disturbed
  - • Autism
  - • Health impaired
  - • Deaf
  - • Hearing impaired
  - • Blind
  - • Visually impaired
  - • Deaf-blind
  - • Multi-disabled
  - • Other – functionally retarded
  - • Other – developmentally delayed
  - • Traumatic brain injury
- Secondary Disability
  - • Learning Disabled
  - • Mentally Retarded
  - • Gifted
  - • Speech impaired
  - • Language impaired
  - • Seriously emotionally disturbed
  - • Autism
  - • Health impaired
  - • Deaf
  - • Hearing impaired
  - • Blind
  - • Visually impaired
  - • Deaf-blind
  - • Multi-disabled
  - • Other – functionally retarded
  - • Other – developmentally delayed
  - • Traumatic brain injury
- Contractual Service – full time services only
  - • In state – State agency

- - In state – private school/agency
  - In state – LEA
  - Out of state – private school/agency
  - Out of state – LEA
- Separate Facility (Y/N)
- Student Type
  - Alternative
  - Regular
  - Headstart
  - Adult
  - Private k-12
  - Pre Kindergarten
  - Pre Kindergarten private
- Activation date (date of first IEP)
- Evaluation date primary (most recent evaluation date for primary option)
- Evaluation date secondary (most recent evaluation date for secondary option)
- Type of service
  - No Service
  - Consultation
  - Direct service
  - Special Ed aide in regular program
  - Psychological services
  - School social work
  - Occupational therapy
  - Speech/Language therapy
  - Recreation service
  - Physical therapy
  - School health services
  - Counseling service
  - Vision service
  - Hearing service
  - Other services
  - Ancillary service – attendant
  - Ancillary service – interpreter
  - Ancillary service – other
  - Residential service
  - Homebound/Hospital
- Number of sessions and unit of time (i.e. 5 week)
- Time per session (hours and minutes)
- Service provider (teacher providing service)
- Reason student transported
  - Unable to ride regular bus due to disability

- Recommended placement cannot be made in student's home school
- Transported for other reasons
- Type of special transportation
  - To and from residential facility
  - To and from school
  - To and from community based program
  - Between schools or programs
- Number of one way trips and frequency
- Travel time one way (hours and minutes)
- Special transportation provider
  - LEA special vehicle
  - LEA contract with parent
  - LEA contract with commercial carrier
  - Provided by other than LEA
- Inactive status date, date student discontinued receiving SE service
- Reason for inactive status
  - Graduated – regular diploma
  - Graduated – SE diploma
  - Graduated – Certificate of attendance
  - Reached maximum age
  - Dropped out
  - Exited to vocational rehabilitation
  - Moved to another LEA in TN
  - Moved to another LEA out of state
  - Mainstreamed
  - To Division of Mental Health
  - To Division of Mental Retardation
  - To Department of Correction
  - To state school
  - Deceased
  - Other
- Anticipated services, value must be provided when inactive status is a "*" reason above.
  - Counseling/guidance
  - Evaluation of VR services
  - Physical/mental restoration
  - Vocational training services
  - Transitional employment services
  - Vocational placement
  - Post employment
  - Maintenance
  - Transportation
  - Family services

- Independent living
- Residential services
- Interpreter services
- Reader services
- Technological Aids
- Other services
- No special services
    - 89-313 Eligibility (Y/N)
    - Special transportation required
    - Materials only
    - Guardian information:
        - Last name
        - First name
        - Middle name
        - Address 1
        - Address 2
        - City
        - State
        - Zip code
        - Status of service
        - Home phone number
        - Business phone number
kk. Name/School data
    - Last Name
    - First Name
    - Middle Name
    - Date of Birth
    - Gender
    - Grade
    - Ethnicity
    - District Number
    - School Number
    - Status of service
        - Full special ed services
        - Regular program
        - Private program
        - Inadequate/inappropriate services
        - No Special Education services
        - Not enrolled
ll. Staff data requirements (in a table maintainable by the State Department of Education)
    - SSN or TLN
    - Last name

- First name
- Middle initial
- Fully certified (Y/N)

mm. Staff category data
- Retained for next year (Y/N)
- Category
    - Special Ed teacher
    - Psychologist
    - Other diagnostic staff
    - Occupational therapist
    - Physical therapist
    - Audiologist
    - Voc Ed teacher
    - Phy Ed teacher
    - Work study coordinator
    - Counselor
    - Recreation therapist
    - School social worker
    - Supervisor/administrator
    - Non-professional staff
    - Interpreters
    - Rehab counselors
    - Speech pathologist
- Full time equivalent (number 1.0 if full time); maximum of 1.0 in all categories for a staff member

A.19 Language Services (ELL/Alternative Language)

This category describes the ability of the Statewide Student Management software to track and maintain Alternative Language services. This includes instructor information as well as student placement. The functionality required for this category is as follows:

a. Track: Program Participation hours in English Language Learners (Y or N), Date last assessed as ELL, and Report date (i.e. 40th day, 80th day, 120th day, or 180th day, language spoken at home, instruction language, state reading and comprehension assessment status (Y or N), native language reading and comprehension assessment status (Y or N), native language test administered, national reading and comprehension percentile rank, whether student reclassified to English proficient, method used to determine English proficiency (test and informal)).

b. Track whether a student's parents have waived their rights to receive ELL services.

c. Track and maintain students Home Language Survey (HLS) results (i.e. eligibility)

d. Track students' Language Assessment (IDEA/IPT) results and/or waiver.

e. Maintain student's IPT history

f. Language Assessment Tests may change over time. Describe how test results can be compared over time as the test changes.

g. Track ELL/alternative language services students are receiving. The system should Track the service provider, type of service, service hours received, curriculum and maintain history.

h. Track student progress and exit them from the Alternative Language monitoring program as appropriate (i.e. monitor student to ensure they maintain Fully English Proficient (FEP) status as they move away from Limited English Proficiency (LEP) status)

i. Search for appropriate instructors for assignment to a ELL student based on location, qualifications, and availability

j. Search for appropriate facilities for assignment to an ELL student based on location, availability and resources. (i.e. language lab)

k. Search for bus routes for schools assigned outside of Zone when language needs dictate.

l. Track current and next years projected school assignment for language needs.

m. Facilitate preliminary assessment of performance/effectiveness of ELL services. (Including: language proficiency scores / hours of instruction / type of services / by student and in aggregate.)

n. Track ELL Student Tutoring assignments

o. Provide ability for a school and district to receive a cumulative report of ESE students with the total number of days suspended

p. Track student's psychologist/social work referrals from referral to placement (I.e., referral date, Child Study Team meeting dates, test scores)

q. Provide check to allow special placement only for students with specific district-defined ESE requirements

r. Print forms for distribution to parents, teachers, administrators, etc with student bio-data pre-filled when applicable.

s. Notify school when ESE students have been officially staffed/placed in an ESE program.

t. Input, query, and produce reports from language information including: PHLOTE (Primary Home Language Other Than English), IPT (IDEA Proficiency Test), or ALS (Alternative Language Services).

u. Report any other non-regular services received by ELL students

A.20 Special Services

This category addresses special services requirements. The functionality for this category is:

a. Track Title 1 A, 1 B (state & federal even start services), 1C (Migrant status), 1D (Neglected and Delinquent youth), IV, VI, VII, VIII, IX, Johnson-O'Malley Financial Assistance to Native American participation status, and Exit date.

b. Track students free and reduced lunch eligibility (Do not show on first page for privacy reasons) ; maintain at State instead of at schools

c. Free Lunch Roster

A.21 Faculty

This category pertains to the faculty portion of the Statewide Student Management software. Included in this category are faculty certification and endorsements. The functionality required for this category is:

a. Match certification, endorsement, and availability of instructors with criteria for required positions

b. Tenure / Non-Tenure indicator

c. Track personnel training

d. Track new hire background checks

e. Track personnel performance
    - Define staff evaluation cycles (Record date of last evaluation and
      when next evaluation is due)

f. Track certifications

g. Report only professional staff (members with current assignments) to EIS

h. Ability to track faculty demographics (address, local ID number, etc.)

i.   Ability for districts/schools to flag any or all staff record types by staff Social Security Number or License Number to be extracted for upload to EIS even when no changes have been made to the staff member's data

j.   Check for Highly Qualified for 'No Child Left Behind' (NCLB)

k.   Teacher/Sub Listing

l.   Teacher Effect Pattern Report

m.   Report on resource allocations, availability and utilization.

n.   Track personnel training

A.22 Counseling

This category pertains to counseling information including referrals and parental consent. The functionality required for this category is:

a.   Report on 'at risk' students to determine what services have been provided in the past.

b.   Track referrals not related to discipline/ESL/etc, including: counseling, speech, home bound, social work, attendance, psychology, occupational/physical therapy. Track date of referral, reason for referral. Include access to history of referrals for a student.

c.   Maintain the confidentiality of referral or other entered information.

d.   For psychological referrals, track: initial reason for referral, re-evaluation results, screening results, supplemental testing results.

e.   Track receipt of parent's informed consent.

f.   Track and report against pre-established time requirements for steps in process (ex. 40 days from referral to testing). The LEA will determine if exceptions are allowed.

g.   Counseling reports: monthly reports including: number of parents seen, number of students seen, types of interventions, discipline, etc.

h.   Allow for tracking and report post graduation information including scholarships, college graduations, etc.

A.23 Adult and Community Education

This category describes the Statewide Student Management software tracking of adult and community education. Topics included are registration, tuition fees, scheduling and attendance. The functionality required for this category is:

a. Allow student registration for adult and community education

b. Ability to track fees/tuition for adult and community education

c. Ability for reconciliation of fees/tuition for adult and community education

d. Ability to schedule students/classes for adult and community education

e. Track attendance and report for adult and community education

f. The system can convert class attendance to hours / course credits for reporting.

g. Track adult/vocational test scores (GED, certifications, etc.)

h. Ability to check pre-requisites for registration and scheduling adult and community education, including: prior course requirements, testing history and dates, etc.

i. Ability to schedule based on minimum class size and notify when minimums are not met

j. Generate mailings for ELL classes based on the ELL student enrollment

k. Provide transcripts for adult and community education

l. Should not report adult students to EIS or transmit adult student extracts to EIS

A.24 Student Activity Fund and Other Fees

This category discusses student activity and other fees including fee waivers and payment tracking. The functionality required for this category is:

a. Ability to handle the collection by teachers of funds and fees

b. Generate collection lists in advance for special activities, clubs, athletics, etc.

c. Ability for teachers or administrators to enter special assessments for students, such as for lost or damaged text books, other student damages, etc.

d. Ability to wave student fees based on special flags (free and reduced lunch students, etc.)

e. Ability to hold transcripts or report cards when fees are owed (Applies to tuition students only)

f. Ability to provide reports or other tools to support collection reconciliation between the teacher and the book-keeper

g. Ability to track payments/refunds to students
   - Track tuition or fee payments made by students at school level or district
     level
   - Allow for installment payments for tuition and other fees

h. Ability to track collection status (partial collections, etc.)

A.25 Standard Reporting Requirements

This category pertains to the standard reporting requirements for the Statewide Student Management software. Items that should be addressed include querying abilities and student reporting. The functionality required for this category is:

a. General Reports / Queries

   - Select and group reporting data by any field with sub-totals and sort orders.

   - In a year round school, report on the different tracks by school

   - Middle School Reports

   - Unassigned Locker Listing

   - Calculate and display school free/reduced lunch totals by school

   - Provide Meals Summary Report

   - District Performance Data Tables

   - Reading Gains Required to Reach Norm

   - Facilitate ordering textbooks based on curriculum and student enrollment

   - Maintain list of approved text books by course on the District Course Catalog

   - Maintain list of required and optional textbook by course on the local course catalog

b. Student Reports / Queries

- Print Exclusion Sheet

- Print Exclusion Letters

- Students by Guidance Counselor

- Students by Homeroom

- Schedule Request Forms

- Student Schedules by Semester/Guidance Counselor And Tally of Credits

- Print Student Schedules Using Student Roll

- Head Count Report

- National Honor Society

- Honor Roll Listing

- Honor Roll Listing, semester

- Dropout Report

- Promotions/Rejections

- Promotions/Rejections (same grade level)

- Codes Report

- Counts by Case Manager

- Course List Showing State Code #'s for Preliminary Reports

- Class Rolls with Address and Phone Number

c. Course Reports / Queries

- Print Course/Semester Catalog

- Preliminary Course Roster

- Report of Preliminary Course Enrollment

- Preliminary Course Frequency Report

- Preliminary Course Roster

- Print Conflict Lists

- Actual Course Frequencies

- Class Roster Report

- Scheduling Intermediate Totals

- Scheduling Exceptions

- Print Room Schedules

- Print Instructor Schedules

- Course List with Section Number by Teacher

A.26 Ad-Hoc Query Requirements

This category pertains to Ad-Hoc Querying with the Statewide Student Management software including tables and graphing. The functionality required for this category is:

a. Menu driven, process driven, and GUI interface reporting

b. Drill-down reporting capabilities are provided

c. Routing list definitions support:
   - Routing or distribution lists can be defined for reports
   - Documents can be sent electronically according to defined routing lists

d. Query Searching Capabilities:
   - Queries/searches can be used with reports
   - Queries/searches can be used with mass updates
   - On-screen searching can be used
   - Free-form text searching capability is included

- Full text searching is provided
- Search definitions are stored
- Scanned documents can be searched for key words

e. Table look ups:
- Table fields are clearly identified or distinguished from other fields on screens
- Tables can be referred to when on a table look-up field
- Table entries are effective-dated
- Changes to tables create a historical table entry

f. Report and Printer Controls:
- The system can control the number of copies made of a report
- The system can control priority of reporting
- The system can control job start time for reports
- End-user can control the fonts in rows and columns of a report
- End-user can define the character style in rows and columns (bold, italics, etc.) of a report

g. Ad Hoc Reporting:
- Ad hoc report definitions are stored
- Ad hoc reports can be run in the background
- Standard reports provided can be modified as ad hoc queries

h. Third Party report generators can be used to access the application files

i. Graphing - The following graphing or charting capabilities are built in:
- Line graphs
- Bar charts
- Pie charts
- Scatter charts
- Stacked bar
- Mid/min/max line graph
- Polar
- Regression lines
- The end-user can toggle between chart and supporting data

j. File export: (Reports printed or exported to .xls or .txt files)
- The system can create a file in a common file format to facilitate interfaces with other applications
- SIF compliance
- The system supports file export to:
- Spreadsheets
- Word processing applications

- Database management systems
- Organization chart utilities
- Graphics packages
- Forms packages
- E-mail systems
- Faxes
- Other computers

k. The following arithmetic and statistical functions are supported in report writing
- Sum
- Average
- Minimum
- Midpoint
- Maximum
- Standard deviation
- Regression analysis
- Median

l. An end-user can define formulas in reports

m. The formatting of dates in reports can be end-user controlled

n. An end-user can define a report's sort order

o. An end-user can change a report's sort order at report run time

p. End-user defined sort definitions can be stored and reused

q. An end-user cam share stored report definitions with other end-users

r. Ability to produce a report of students participating in sports sorted by gender / ethnicity

SECTION B: SCOPE OF SERVICES AND DELIVERABLES (IMPLEMENTATION, TRAINING AND SUPPORT)

B.1   Data Conversion

This category describes the data conversion functionality of the Statewide Student Management software. The functionality requirements for this category are:

a. Ability to convert existing data to a format designated by the State.

b. Provide edits to ensure data captured is valid and consistent.

c. Ability for data to be exported locally in a text format.

d. Ability to interface with the State Department of Education licensure database.

B.2 Implementation

This category pertains to the implementation of the Statewide Student Management software including roles and responsibilities during implementation. The following must be provided:

a. Provide projected schedule of implementation

b. Provide commitments and guarantees that the software will be implemented in a timely manner.

B.3 Training

This category discusses training for the Statewide Student Management software. This includes expected help utilities available after implementation. The requirements for training are as follows:

a. Provide an on-line system user manual that can be modified by SDE staff.

b. Provide an on-line help utility with help available for all data fields on the screen, worded so that it will be useful for end-users and technical staff.

c. Provide training for data importing and manipulation to Local Education staff and State Department of Education technical personnel.

B.4 On-Site Support

This category describes the on-site support needed after implementation of the Statewide Student Management software:

a. Provide on-site support for Local Education agencies as requested by SDE to include existing data conversion, loading of data to database, and correcting software-related data issues. Support should be available within 24 hours of request.

b. Provide on-site support for State Department of Education technical staff to include existing data conversion, loading of data to database, and correcting software-related data issues. Support should be available Monday through Friday, from 7:00 am to 5:00 pm Central Standard time.

c. On-site support will continue for the duration of the contract.

B.5 Documentation

This category describes the documentation that must be provided with the Statewide Student Management software:

a. Provide a plain language data dictionary

b. Provide a description of all data fields available, including which fields are protected (cannot be changed) and which fields are non-protected (can be changed).

c. Provide a detailed description of the functionality available in the Statewide Student Management software including attendance, grade book, special education, scheduling and discipline.

d. Provide procedures for running queries and producing reports

e. Provide instructions for data lookup and update

f. Provide a detailed description of possible causes of error messages

g. Provide documentation on any and all add-on functions/modules available for the software.

C. Project Schedule

C.1 Dates in this attachment are tentative and subject to change, at the State's discretion, any time throughout the project.

DATES	MILESTONES
January 1, 2004	Project Contract Signing and Start
January 1, 2004 through June 30, 2004	Data conversion, implementation, training, and support for 25 pilot districts
July 1, 2004 through June 30, 2005	Data conversion, implementation, training, and support for an additional districts; maintenance and support for districts implemented in Year One.
July 1, 2005 through June 30, 2006	Data conversion, implementation, training, and support for additional districts; maintenance and support for districts implemented in Year One and Year Two
July 1, 2006 through June 30, 2007	Data conversion, implementation, training, and support for additional districts; maintenance and support for districts implemented in Years One, Two, and Three
July 1, 2007 through June 30, 2008	Maintenance and support for districts implemented in Years One, Two, Three, and Four

D.   CONTRACT TERM:

D.1.   Contract Term. This Contract shall be effective for the period commencing on January 1, 2004 and ending on June 30, 2008. The State shall have no obligation for services rendered by the Contractor which are not performed within the specified period.

E.   PAYMENT TERMS AND CONDITIONS:

E.1.   Maximum Liability. In no event shall the maximum liability of the State under this Contract exceed [WRITTEN DOLLAR AMOUNT] ($[NUMBER AMOUNT]). The Service Rates in Section E.3 shall constitute the entire compensation due the Contractor for the Service and all of the Contractor's obligations hereunder regardless of the difficulty, materials or equipment required. The Service Rates include, but are not limited to, all applicable taxes, fees, overheads, and all other direct and indirect costs incurred or to be incurred by the Contractor.

The Contractor is not entitled to be paid the maximum liability for any period under the Contract or any extensions of the Contract for work not requested by the State. The maximum liability represents available funds for payment to the Contractor and does not guarantee payment of any such funds to the Contractor under this Contract unless the State requests work and the Contractor performs said work. In which case, the Contractor shall be paid in accordance with the Service Rates detailed in Section E.3. The State is under no obligation to request work from the Contractor in any specific dollar amounts or to request any work at all from the Contractor during any period of this Contract.

E.2.   Compensation Firm. The Service Rates and the Maximum Liability of the State under this Contract are firm for the duration of the Contract and are not subject to escalation for any reason unless amended.

E.3.   Payment Methodology. The Contractor shall be compensated based on the Service Rates herein for units of service authorized by the State in a total amount not to exceed the Contract Maximum Liability established in Section E.1. The Contractor's compensation shall be contingent upon the satisfactory completion of units of service or project milestones defined in Section A. The Contractor shall be compensated based upon the following Service Rates:

SERVICE UNIT/MILESTONE	**Cost per Year Per ADM**
The Average Daily Membership (ADM) is a calculation that is used to determine the number of students in each district.	

Year One Pilot Cost Schedule January 1, 2004 through June 30, 2004

Cost per ADM for Data Conversion, Implementation, and Training for 25 pilot districts	$
Cost per ADM for Support for 25 pilot districts (to be prorated based on implementation date)	$

Year Two Cost Schedule from July 1, 2004 through June 30, 2005

Cost per ADM for Data Conversion, Implementation, and Training for additional districts.	$
Cost per ADM for Support for Year Two additional districts (to be prorated based on implementation date).	$
Cost Per ADM for Annual Maintenance and Support for districts implemented in Year One.	$

Year Three Cost Schedule from July 1, 2005 through June 30, 2006

Cost per ADM for Data Conversion, Implementation, and Training for additional districts	$

Cost per ADM for Support for Year Three additional districts (to be prorated based on implementation date)	$
Cost Per ADM for Annual Maintenance and Support for districts implemented in Year One and Year Two	$

Year Four Cost Schedule from July 1, 2006 through June 30, 2007

Cost per ADM for Data Conversion, Implementation, and Training for additional districts	$
Cost per ADM for Support for Year Four additional districts (to be prorated based on implementation date)	$
Cost Per ADM for Annual Maintenance and Support for districts implemented in Years One, Two, and Three	$

Year Five Cost Schedule from July 1, 2007 through June 30, 2008

Cost Per ADM for Annual maintenance and support for districts implemented in Years One, Two, Three, and Four	$

The Contractor shall submit monthly invoices, in form and substance acceptable to the State with all of the necessary supporting documentation, prior to any payment. Such invoices shall be submitted for completed units of service or project milestones for the amount stipulated.

E.4.   Travel Compensation. The Contractor shall not be compensated or reimbursed for travel, meals, or lodging.

E.5.   Payment of Invoice. The payment of the invoice by the State shall not prejudice the State's right to object to or question any invoice or matter in relation thereto. Such payment by the State shall neither be construed as acceptance of any part of the work or service provided nor as an approval of any of the amounts invoiced therein.

E.6.   Invoice Reductions. The Contractor's invoice shall be subject to reduction for amounts included in any invoice or payment theretofore made which are determined by the State, on the basis of audits conducted in accordance with the terms of this contract, not to constitute proper remuneration for compensable services.

E.7.   Deductions. The State reserves the right to deduct from amounts which are or shall become due and payable to the Contractor under this or any contract between the Contractor and the State of Tennessee any amounts which are or shall become due and payable to the State of Tennessee by the Contractor.

E.8.   Automatic Deposits. The Contractor shall complete and sign an "Authorization Agreement for Automatic Deposit (ACH Credits) Form." This form shall be provided to the Contractor by the State. Once this form has been completed and submitted to the State by the Contractor all payments to the Contractor, under this or any other contract the Contractor has with the State of Tennessee shall be made by Automated Clearing House (ACH). The Contractor shall not invoice the State for services until the Contractor has completed this form and submitted it to the State.

F.   STANDARD TERMS AND CONDITIONS:

F.1.   Required Approvals. The State is not bound by this Contract until it is approved by the appropriate State officials in accordance with applicable Tennessee State laws and regulations.

F.2.   Modification and Amendment. This Contract may be modified only by a written amendment executed by all parties hereto and approved by the appropriate Tennessee State officials in accordance with applicable Tennessee State laws and regulations.

F.3.   Termination for Convenience. The State may terminate this Contract without cause for any reason. Said termination shall not be deemed a Breach of Contract by the State. The State shall give the Contractor at least sixty (60) days written notice before the effective termination date. The Contractor shall be entitled to receive compensation for satisfactory, authorized service completed as of the termination date, but in no event shall the State be liable to the Contractor for compensation for any service which has not been rendered. Upon such termination, the Contractor shall have no right to any actual general, special, incidental, consequential, or any other damages whatsoever of any description or amount.

F.4.   Termination for Cause. If the Contractor fails to properly perform its obligations under this Contract in a timely or proper manner, or if the Contractor violates any terms of this Contract, the State shall have the right to immediately terminate the Contract and withhold payments in excess of fair compensation for completed services. Notwithstanding the above, the Contractor shall not be relieved of liability to the State for damages sustained by virtue of any breach of this Contract by the Contractor.

F.5.   Subcontracting. The Contractor shall not assign this Contract or enter into a subcontract for any of the services performed under this Contract without obtaining the prior written approval of the State. If such subcontracts are approved by the State, they shall contain, at a minimum, sections of this Contract pertaining to "Conflicts of Interest" and "Nondiscrimination" (sections F.6. and F.7.). Notwithstanding any use of approved subcontractors, the Contractor shall be the prime contractor and shall be responsible for all work performed.

F.6.   Conflicts of Interest. The Contractor warrants that no part of the total Contract Amount shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Contractor in connection with any work contemplated or performed relative to this Contract.

F.7.   Nondiscrimination. The Contractor hereby agrees, warrants, and assures that no person shall be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract or in the employment practices of the Contractor on the grounds of disability, age, race, color, religion, sex, national origin, or any other classification protected by Federal, Tennessee State constitutional, or statutory law. The Contractor shall, upon request, show proof of such nondiscrimination and shall post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.

F.8.   Records. The Contractor shall maintain documentation for all charges against the State under this Contract. The books, records, and documents of the Contractor, insofar as they relate to work performed or money received under this contract, shall be maintained for a period of three (3) full years from the date of the final payment and shall be subject to audit at any reasonable time and upon reasonable notice by the State, the Comptroller of the Treasury, or their duly appointed representatives. The financial statements shall be prepared in accordance with generally accepted accounting principles.

F.9.   Monitoring. The Contractor's activities conducted and records maintained pursuant to this Contract shall be subject to monitoring and evaluation by the State, the Comptroller of the Treasury, or their duly appointed representatives.

F.10.   Progress Reports. The Contractor shall submit brief, periodic, progress reports to the State as requested.

F.11.   Strict Performance. Failure by any party to this Contract to insist in any one or more cases upon the strict performance of any of the terms, covenants, conditions, or provisions of this Contract shall not be construed as a waiver or relinquishment of any such term, covenant, condition, or provision. No term or condition of this Contract shall be held to be waived, modified, or deleted except by a written amendment signed by the parties hereto.

F.12.   Independent Contractor. The parties hereto, in the performance of this Contract, shall not act as employees, partners, joint venturers, or associates of one another. It is expressly acknowledged by the parties hereto that such parties are independent contracting entities and that nothing in this Contract shall be construed to create an employer/employee relationship or to allow either to exercise control or direction over the manner or method by which the other transacts its business affairs or provides its usual services. The employees or agents of one party shall not be deemed or construed to be the employees or agents of the other party for any purpose whatsoever.

The Contractor, being an independent contractor and not an employee of the State, agrees to carry adequate public liability and other appropriate forms of insurance, including adequate public liability and other appropriate forms of insurance on the Contractor's employees, and to pay all applicable taxes incident to this Contract.

F.13.   State Liability. The State shall have no liability except as specifically provided in this Contract.

F.14.   Force Majeure. The obligations of the parties to this contract are subject to prevention by causes beyond the parties' control that could not be avoided by the exercise of due care including, but not limited to, acts of God, riots, wars, strikes, epidemics or any other similar cause.

F.15.   State and Federal Compliance. The Contractor shall comply with all applicable State and Federal laws and regulations in the performance of this Contract.

F.16.   Governing Law. This Contract shall be governed by and construed in accordance with the laws of the State of Tennessee. The Contractor agrees that it will be subject to the exclusive jurisdiction of the courts of the State of Tennessee in actions that may arise under this Contract. The Contractor acknowledges and agrees that any rights or claims against the State of Tennessee or its employees hereunder, and any remedies arising therefrom, shall be subject to and limited to those rights and remedies, if any, available under *Tennessee Code Annotated*, Sections 9-8-101 through 9-8-407.

F.17.   Completeness. This Contract is complete and contains the entire understanding between the parties relating to the subject matter contained herein, including all the terms and conditions of the parties' agreement. This Contract supersedes any and all prior understandings, representations, negotiations, and agreements between the parties relating hereto, whether written or oral.

F.18.   Severability. If any terms and conditions of this Contract are held to be invalid or unenforceable as a matter of law, the other terms and conditions hereof shall not be affected thereby and shall remain in full force and effect. To this end, the terms and conditions of this Contract are declared severable.

F.19. Headings. Section headings of this Contract are for reference purposes only and shall not be construed as part of this Contract.

G. SPECIAL TERMS AND CONDITIONS:

G.1. Conflicting Terms and Conditions. Should any of these special terms and conditions conflict with any other terms and conditions of this Contract, these special terms and conditions shall control.

G.2. Communications and Contacts. All instructions, notices, consents, demands, or other communications required or contemplated by this Contract shall be in writing and shall be made by facsimile transmission, by overnight courier service, or by first class mail, postage prepaid, addressed to the respective party at the appropriate facsimile number or address as set forth below or to such other party, facsimile number, or address as may be hereafter specified by written notice.

The State:
  Dr. Tim Webb, Assistant Commissioner
  Department of Education
  6th Floor, Andrew Johnson Tower
  710 James Robertson Parkway
  Nashville, TN 37243
  phone: 615-532-1650
  fax: 615-532-3268

The Contractor:
  [NAME AND TITLE OF CONTRACTOR CONTACT PERSON]
  [CONTRACTOR NAME]
  [ADDRESS]
  [TELEPHONE NUMBER]
  [FACSIMILE NUMBER]

All instructions, notices, consents, demands, or other communications shall be considered effectively given as of the day of delivery; as of the date specified for overnight courier service delivery; as of three (3)business days after the date of mailing; or on the day the facsimile transmission is received mechanically by the telefax machine at the receiving location and receipt is verbally confirmed by the sender if prior to 4:30 p.m. CST. Any communication by facsimile transmission shall also be sent by United States mail on the same date of the facsimile transmission.

G.3. Subject to Funds Availability. The Contract is subject to the appropriation and availability of State and/or Federal funds. In the event that the funds are not appropriated or are otherwise unavailable, the State reserves the right to terminate the Contract upon written notice to the Contractor. Said termination shall not be deemed a breach of Contract by the State. Upon receipt of the written notice, the Contractor shall cease all work associated with the Contract. Should such an event occur, the Contractor shall be entitled to compensation for all satisfactory and authorized services completed as of the termination date. Upon such termination, the Contractor shall have no right to recover from the State any actual, general, special, incidental, consequential, or any other damages whatsoever of any description or amount.

G.4. Performance Bond. Upon approval of the Contract by all appropriate State officials in accordance with applicable State laws and regulations, the Contractor shall furnish a performance bond in the amount equal to Five Million Dollars ($5,000,000) for the period January 1, 2004 to June 30, 2005 and Two and One Half million dollars ($2,500,000) the period July 1, 2005 to June 30, 2008, guaranteeing full and faithful performance of all undertakings and obligations under this Contract for the initial Contract term and all extensions thereof. The bond

shall be in the manner and form prescribed by the State and must be issued through a company licensed to issue such a bond in the State of Tennessee.

The Contractor shall obtain the required performance bond in form and substance acceptable to the State and provide it to the State no later than January 16, 2004 Failure to provide the performance bond prior to the deadline as required shall result in contract termination.

In lieu of a performance bond, a surety deposit, in the sum of Five Million dollars ($5,000,000) for the period January 1, 2004 to June 30, 2005 and Two and One Half million dollars ($2,500,000) the period July 1, 2005 to June 30, 2008 may be substituted if approved by the State prior to its submittal.

G.5.   Incorporation of Additional Documents. Included in this Contract by reference are the following documents:

a. The Contract document and its attachments
b. All Clarifications and addenda made to the Contractor's Proposal
c. The Request for Proposal and its associated amendments
d. Technical Specifications provided to the Contractor
e. The Contractor's Proposal

In the event of a discrepancy or ambiguity regarding the Contractor's duties, responsibilities, and performance under this Contract, these documents shall govern in order of precedence detailed above.

G.6.   Lobbying. The Contractor certifies, to the best of its knowledge and belief, that:

No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, and entering into any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

The Contractor shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including sub-grants, subcontracts, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients of federally appropriated funds shall certify and disclose accordingly.

G.7.   Public Funding Notice. All notices, informational pamphlets, press releases, research reports, signs, and similar public notices prepared and released by the Contractor relative to this Contract shall include the statement, "This project is funded under an agreement with the State of Tennessee." Any such notices by the Contractor shall be approved by the State.

G.8.   Prohibited Advertising. The Contractor shall not refer to this Contract or the Contractor's relationship with the State hereunder in commercial advertising in such a manner as to state or imply that the Contractor or the Contractor's services are endorsed.

G.9.   Confidentiality of Records. Strict standards of confidentiality of records shall be maintained in accordance with the law. All material and information, regardless of form, medium or method of communication, provided to the Contractor by the State or acquired by the Contractor on behalf of the State shall be regarded as confidential information in accordance with the provisions of State law and ethical standards and shall not be disclosed, and all necessary steps shall be taken by the Contractor to safeguard the confidentiality of such material or information in conformance with State law and ethical standards.

The Contractor will be deemed to have satisfied its obligations under this section by exercising the same level of care to preserve the confidentiality of the State's information as the Contractor exercises to protect its own confidential information so long as such standard of care does not violate the applicable provisions of the first paragraph of this section.

The Contractor's obligations under this section do not apply to information in the public domain; entering the public domain but not from a breach by the Contractor of this Contract; previously possessed by the Contractor without written obligations to the State to protect it; acquired by the Contractor without written restrictions against disclosure from a third party which, to the Contractor's knowledge, is free to disclose the information; independently developed by the Contractor without the use of the State's information; or, disclosed by the State to others without restrictions against disclosure.

It is expressly understood and agreed the obligations set forth in this section shall survive the termination of this Contract.

G.10.   Copyrights and Patents. The Contractor agrees to indemnify and hold harmless the State of Tennessee as well as its officers, agents, and employees from and against any and all claims or suits which may be brought against the State for infringement of any laws regarding patents or copyrights which may arise from the Contractor's performance of this Contract. In any such action brought against the State, the Contractor shall satisfy and indemnify the State for the amount of any final judgment for infringement. The Contractor further agrees it shall be liable for the reasonable fees of attorneys for the State in the event such service is necessitated to enforce the terms of this Contract or otherwise enforce the obligations of the Contractor to the State. The State shall give the Contractor written notice of any such claim or suit and full right and opportunity to conduct the Contractor's own defense thereof.

G.11.   Public Accountability. If this Contract involves the provision of services to citizens by the Contractor on behalf of the State, the Contractor agrees to establish a system through which recipients of services may present grievances about the operation of the service program, and the Contractor agrees to display a sign stating:

"NOTICE: This Contractor is a recipient of taxpayer funding. if you observe an employee engaging in any activity which you consider to be illegal or improper, please call the State Comptroller's toll free hotline: 1-800-232-5454"

Said sign shall be displayed in a prominent place, located near the passageway(s) through which the public passes to receive State funded services.

G.12.   Date/Time Hold Harmless. As required by *Tennessee Code Annotated*, Section 12-4-118, the contractor shall hold harmless and indemnify the State of Tennessee; its officers and employees; and any agency or political subdivision of the State for any breach of contract caused directly or indirectly by the failure of computer software or any device containing a computer processor to accurately or properly recognize, calculate, display, sort or otherwise process dates or times.

G.13.   Hold Harmless. The Contractor agrees to indemnify and hold harmless the State of Tennessee as well as its officers, agents, and employees from and against any and all claims, liabilities, losses, and causes of action which may arise, accrue, or result to any person, firm, corporation,

or other entity which may be injured or damaged as a result of acts, omissions, or negligence on the part of the Contractor, its employees, or any person acting for or on its or their behalf relating to this Contract. The Contractor further agrees it shall be liable for the reasonable cost of attorneys for the State in the event such service is necessitated to enforce the terms of this Contract or otherwise enforce the obligations of the Contractor to the State.

In the event of any such suit or claim, the Contractor shall give the State immediate notice thereof and shall provide all assistance required by the State in the State's defense. The State shall give the Contractor written notice of any such claim or suit, and the Contractor shall have full right and obligation to conduct the Contractor's own defense thereof. Nothing contained herein shall be deemed to accord to the Contractor, through its attorney(s), the right to represent the State of Tennessee in any legal matter, such rights being governed by *Tennessee Code Annotated*, Section 8-6-106.

G.14. Tennessee Consolidated Retirement System. The Contractor acknowledges and understands that, subject to statutory exceptions contained in *Tennessee Code Annotated*, Section 8-36-801, *et. seq*., the law governing the Tennessee Consolidated Retirement System, provides that if a retired member returns to State employment, the member's retirement allowance is suspended during the period of the employment. Accordingly and notwithstanding any provision of this Contract to the contrary, the Contractor agrees that if it is later determined that the true nature of the working relationship between the Contractor and the State under this Contract is that of "employee/employer" and not that of an independent contractor, the Contractor may be required to repay to the Tennessee Consolidated Retirement System the amount of retirement benefits the Contractor received from the Retirement System during the period of this Contract.

G.15. Debarment and Suspension. The Contractor certifies, to the best of its knowledge and belief, that it and its principals:

a. are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal or State department or agency;

b. have not within a three (3) year period preceding this Contract been convicted of, or had a civil judgment rendered against them from commission of fraud, or a criminal offence in connection with obtaining attempting to obtain, or performing a public (Federal, State, or Local) transaction or grant under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;

c. are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or Local) with commission of any of the offenses detailed in section b. of this certification; and

d. have not within a three (3) year period preceding this Contract had one or more public transactions (Federal, State, or Local) terminated for cause or default.

G.16 HIPAA Compliance. Contractor warrants to the State that it is familiar with the requirements of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and its accompanying regulations, and will comply with all applicable HIPAA requirements in the course of this contract. Contractor warrants that it will cooperate with the State in the course of performance of the contract so that both parties will be in compliance with HIPAA, including cooperation and coordination with State privacy officials and other compliance officers required by HIPAA and its regulations. Contractor will sign any documents that are reasonably necessary to keep the State and Contractor in compliance with HIPAA, including but not limited to business associate agreements.

IN WITNESS WHEREOF:

[CONTRACTOR LEGAL ENTITY NAME]:

_____

[NAME AND TITLE]   **Date**

DEPARTMENT OF EDUCATION:

_____

Lana C. Seivers, Commissioner   **Date**

APPROVED:

DEPARTMENT OF FINANCE AND ADMINISTRATION:

_____

M. D. Goetz Jr., Commissioner   **Date**

DEPARTMENT OF PERSONNEL:

_____

Randy C. Camp, Commissioner   **Date**

COMPTROLLER OF THE TREASURY:

_____

John G. Morgan, Comptroller of the Treasury   **Date**

ATTACHMENT 9.1

CERTIFICATION OF COMPLIANCE

RFP # 331.25-001

Proposer Name

By indication of the authorized signature below, the Proposer does hereby make certification and assurance of the Proposer's compliance with:

    a)   the laws of the State of Tennessee;

    b)   Title VI of the federal Civil Rights Act of 1964;

    c)   Title IX of the federal Education Amendments Act of 1972;

    d)   the Equal Employment Opportunity Act and the regulations issued thereunder by the federal government;

    e)   the Americans with Disabilities Act of 1990 and the regulations issued thereunder by the federal government;

    f)   the condition that the submitted proposal was independently arrived at, without collusion, under penalty of perjury; and,

    g)   the condition that no amount shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the Procurement under this RFP.

Proposer Signature　　　　　　　　　　　　　　**Date**

ATTACHMENT 9.2

COST PROPOSAL FORMAT

RFP # 331.25-001

Proposer Name

NOTICE TO PROPOSER:
The Proposer shall indicate below the offered price for providing all services proposed including all services as defined in the *pro forma* contract Scope of Services of the subject RFP. This Cost Proposal must specifically record below the exact cost amount(s) proposed in the appropriate space(s) as required herein. Said cost proposed must incorporate all cost for the proposed scope of services for the total contract period.
The Cost Proposal shall detail only the cost proposed as required, and shall not detail any other rates, amounts, or information. It shall not detail any text that could be construed as a qualification of the cost proposed. If the Proposer fails to specify the Cost Proposal as required, the State shall determine the proposal to be nonresponsive and reject it.
The proposer must sign and date the Cost Proposal.

Cost must be proposed for each of the following cost-component categories and in accordance with the following instructions.

The Proposer shall indicate below the offered price for providing all services proposed including all services as defined in the *pro forma* contract Scope of Services of the subject RFP.

Overview

The following cost proposal format is organized into five sections, one for each year of the contract with the first year being an abbreviated year. Within a given year, the proposer is to respond with its cost detail for each of the following items:

1. Cost per Year per Average Daily Membership (ADM) for data conversion, implementation, and training.
2. Cost per Year per ADM for support after item one is complete. The payment for this item will be prorated for the year based on the implementation date.
3. Cost per Year per ADM for annual maintenance and support for districts implemented in previous years.

The following table details the number of school districts within each membership configuration and is provided for information only.

ADM	# of Districts
< 500	4
501 – 1,000	11
1,001 – 2,000	23
2,001 – 3,000	21

3,001 – 4,000	16
4,001 – 5,000	16
5,001 – 10,000	26
10,001 – 15,000	9
15,001 – 20,000	0
20,000 – 25,000	1
25,001 – 30,000	3
30,001 – 40,000	0
40,001 – 50,000	2
50,001 – 60,000	1
60,001 – 70,000	0
> 70,000	2

All sheets in this attachment must be filled out in its entirety, or the State shall determine the proposal to be non-responsive and reject it.

Explanations and Instructions

The number of districts to be implemented and total ADM for year one is estimated. Total ADM for Years Two, Three, and Four is also an estimated number.

The software will be installed using a phase in approach. It is the intent of SDE to have some of the smaller districts ready to begin using SSMS by July 1, 2004. These districts/schools will serve as pilot sites to validate any requirements with the software, training, and documentation. Other districts will come online as needed after the July 1, 2004 date. The RFP and subsequent contract will provide for implementing all 136 school districts. However, it is not anticipated that all 136 school districts will choose to participate.

The selected districts to be implemented in the pilot year and subsequent years will be done on a volunteer basis. It is expected that there will be districts from middle, east, and west Tennessee and there will be a mixture of small, medium, and large school districts. Those school districts who currently cannot report electronically to the Education Information System will be the first pilot districts. If the number of volunteers exceeds the number that is to be implemented in any given year, then the Department will select the districts to be converted from a lottery.

Line by line explanations and instructions for the following Cost Proposal Spreadsheets are detailed below:

Year One Pilot Cost Schedule – January 1, 2004 through June 30, 2004

> **Total Cost Calculation -** this section calculates the total amount paid per ADM to the proposer for data conversion, implementation, training, and support for the implementation of 25 pilot districts.

> **Line 1 – Cost per ADM for Data Conversion, Implementation, and Training for 25 pilot districts.**

> *Explanation* – The cost per average daily membership to provide all the services required under this RFP to successfully accomplish the data conversion, implementation and training of 25 districts from January 1, 2004 through June 30, 2004.

> *Instruction* – The proposer shall input the per year cost per ADM in the box with the column header "Cost per Year per ADM".

> **Line 2 – Cost per ADM for Support for 25 pilot districts (to be prorated based on implementation date).**

Explanation – The cost per average daily membership to provide ongoing first year support services for 25 pilot districts. The annual cost will be prorated based on the actual implementation date for each district.

Instruction – The proposer shall input the <u>per year cost per ADM</u> in the box with the column header "Cost per Year per ADM".

Year Two Cost Schedule July 1, 2004 through June 30, 2005

Total Cost Calculation - this section calculates the total amount paid per ADM to the proposer for data conversion, implementation, training, and support for the additional districts to be implemented and the annual maintenance and support of the Year One districts.

Line 1 – Cost per ADM for Data Conversion, Implementation, and Training for additional districts.

Explanation – The cost per average daily membership to provide all the services required under this RFP to successfully accomplish the data conversion, implementation and training of additional districts from July 1, 2004 through June 30, 2005.

Instruction – The proposer shall input the <u>per year cost per ADM</u> in the box with the column header "Cost per Year per ADM".

Line 2 – Cost per ADM for Support for Year Two additional districts (to be prorated based on implementation date).

Explanation – The cost per average daily membership to provide ongoing first year support services for Year Two additional districts. The annual cost will be prorated based on the actual implementation date for each district.

Instruction – The proposer shall input the <u>per year cost per ADM</u> in the box with the column header "Cost per Year per ADM".

Line 3 – Cost per ADM for Annual Maintenance and Support for the districts implemented in Year One.

Explanation – The cost per average daily membership to provide annual maintenance and support for the districts implemented in Year One.

Instruction – The proposer shall input the <u>per year cost per ADM</u> in the box with the column header "Cost per Year Per ADM".

Year Three Cost Schedule July 1, 2005 through June 30, 2006

Total Cost Calculation - this section calculates the total amount paid per ADM to the proposer for data conversion, implementation, training, and support for the additional districts to be implemented and the annual maintenance and support of the districts implemented in Years One and Two.

Line 1 – Cost per ADM for Data Conversion, Implementation, and Training for additional districts.

Explanation – The cost per average daily membership to provide all the services required under this RFP to successfully accomplish the data conversion, implementation and training of additional districts from the July 1, 2005 through June 30, 2006.

Instruction – The proposer shall input the <u>per year cost per ADM</u> in the box with the column header "Cost per Year Per ADM".

Line 2 – Cost per ADM for Support for Year Three additional districts(to be prorated based on implementation date).

Explanation – The cost per average daily membership to provide ongoing first year support services for Year Three additional districts. The annual cost will be prorated based on the actual implementation date for each district.

Instruction – The proposer shall input the <u>per year cost per ADM</u> in the box with the column header "Cost per Year Per ADM".

Line 3 – Cost per ADM for Annual Maintenance and Support for the districts implemented in Years One and Two.

Explanation – The cost per average daily membership to provide annual maintenance and support for the districts implemented in Years One and Two.

Instruction – The proposer shall input the <u>per year cost per ADM</u> in the box with the column header "Cost per Year Per ADM".

Year Four Cost Schedule July 1, 2006 through June 30, 2007

Total Cost Calculation - this section calculates the total amount paid per ADM to the proposer for data conversion, implementation, training, and support for the additional districts to be implemented and the annual maintenance and support of the districts implemented in Years One, Two, and Three.

Line 1 – Cost per ADM for Data Conversion, Implementation, and Training for additional districts.

Explanation – The cost per average daily membership to provide all the services required under this RFP to successfully accomplish the data conversion, implementation and training of additional districts from July 1, 2005 through June 30, 2006.

Instruction – The proposer shall input the <u>per year cost per ADM</u> in the box with the column header "Cost per Year Per ADM".

Line 2 – Cost per ADM for Support for Year Four additional districts (to be prorated based on implementation date).

Explanation – The cost per average daily membership to provide ongoing first year support services for Year Four additional districts. The annual cost will be prorated based on the actual implementation date for each district.

Instruction – The proposer shall input the <u>per year cost per ADM</u> in the box with the column header "Cost per Year Per ADM".

Line 3 – Cost per ADM for Annual Maintenance and Support for districts implemented in Years One, Two, and Three.

Explanation – The cost per average daily membership to provide annual maintenance and support for districts implemented in Years One, Two, and Three.

Instruction – The proposer shall input the <u>per year cost per ADM </u>in the box with the column header "Cost per Year Per ADM".

Year Five Cost Schedule July 1, 2007 through June 30, 2008

Total Cost Calculation - this section calculates the total amount paid per ADM to the proposer for annual maintenance and support of all implemented districts.

Line 1 – Cost per ADM for Annual Maintenance and Support for the districts implemented in Years One, Two, Three, and Four.

Explanation – The cost per average daily membership to provide annual maintenance and support for the districts implemented in Years One, Two, Three, and Four.

Instruction – The proposer shall input the per year cost per ADM in the box with the column header "Cost per Year Per ADM".

Year One Pilot Cost Schedule January 1, 2004 through June 30, 2004

	Total Cost Calculation	Cost per Year Per ADM
Line		
1	Cost per ADM for Data Conversion, Implementation, and Training for an estimated 25 pilot districts (97,000 ADM)	$
2	Cost per ADM for Support for an estimated 25 pilot districts (to be prorated based on implementation date)	$

Year Two Cost Schedule from July 1, 2004 through June 30, 2005

	Total Cost Calculation	Cost per Year Per ADM
Line		
1	Cost per ADM for Data Conversion, Implementation, and Training for additional districts with a total 189,000 ADM	$
2	Cost per ADM for Support for Year Two additional districts with 189,000 ADM (to be prorated based on implementation date)	$
3	Cost Per ADM for Annual Maintenance and Support for districts implemented in Year One (97,000 ADM).	$

Year Three Cost Schedule from July 1, 2005 through June 30, 2006

	Total Cost Calculation	Cost per Year Per ADM
Line		
1	Cost per ADM for Data Conversion, Implementation, and Training for additional districts with a total 189,000 ADM.	$
2	Cost per ADM for Support for Year Three additional districts with 189,000 ADM (to be prorated based on implementation date)	$
3	Cost Per ADM for Annual Maintenance and Support for districts implemented in Year One and Year Two (286,000 ADM).	$

Year Four Cost Schedule from July 1, 2006 through June 30, 2007

	Total Cost Calculation	Cost per Year Per ADM
Line		
1	Cost per ADM for Data Conversion, Implementation, and Training for additional districts with a total 189,000 ADM.	$
2	Cost per ADM for Support for Year Four additional districts with 189,000 ADM (to be prorated based on implementation date)	$
3	Cost Per ADM for Annual Maintenance and Support for districts implemented in Years One, Two and Three (475,000 ADM).	$

Year Five Cost Schedule from July 1, 2007 through June 30, 2008

	Total Cost Calculation	Cost per Year Per ADM
Line		
1	Cost Per ADM for Annual Maintenance and Support for districts implemented in Years One, Two, Three and Four (664,000 ADM).	$

The proposed cost contained herein and the submitted technical proposal associated with this cost shall remain valid for at least one hundred and twenty (120) days subsequent to the date of the Cost Proposal opening and thereafter in accordance with any resulting contract between the Proposer and the State.

_____

Proposer Signature and Date

ATTACHMENT 9.3

TECHNICAL PROPOSAL EVALUATION FORMAT

RFP # 331.25-001

Proposer Name

Evaluator	**Date**

PROPOSAL EVALUATIONS CATEGORY (AND RELATED CRITERIA)	SCORE
General Proposer Qualifications and Experience (Maximum Points: 35) - vendor credentials - Proposer's background including an organizational history - whether the Proposer or any of the Proposer's employees, agents, independent contractors, or subcontractors have been convicted of, pled guilty to, or pled *nolo contendere* to any felony - pending litigation against the Proposer - bankruptcy or insolvency proceedings - organizational chart highlighting key personnel assigned to accomplish the work called for in this RFP - proposed project team, members, and organizational structure - personnel roster and resumes of key people assigned to the proposed project - performance of current contractual relationships with the State of Tennessee or those completed within the previous five year period - customer references for similar projects representing both the three largest accounts currently serviced by the vendor and three completed projects	

Technical Approach (Maximum Points: 35)

- vendor's understanding of the requirements of the project and the project approach and management and the project schedule; items are scored on a raw point scale and each item is weighted. General guidelines for assigning points are as follows:
   - **0 --** No value
   - **1 --** Poor
   - **2 --** Below Average
   - **3 --** Average
   - **4 --** Above Average
   - **5 --** Excellent

   The sections labeled Project Understanding and Approach and Project Schedule will be evaluated with this scale.

- how the Proposer will complete the scope of services as required, including functionality, implementation, training and support; items are identified as Most Desirable (M); Desirable (D); and Optional (O). The proposer is to respond with a Yes or No to each item.

   The sections labeled Functional Requirements and Implementation, Training, and Support will be evaluated with this scale.

TOTAL TECHNICAL PROPOSAL SCORE:

TECHNICAL APPROACH -- 35 POINTS

  PROJECT UNDERSTANDING AND APPROACH -- 5 POINTS

  TOTAL RAW WEIGHTED SCORE_____   X   5   =   _____
  POSSIBLE RAW WEIGHTED SCORE   (25)

  FUNCTIONAL REQUIREMENTS -- 16 POINTS

  TOTAL RAW WEIGHTED SCORE_____   X   16   =   _____
  POSSIBLE RAW WEIGHTED SCORE   (5929)

  IMPLEMENTATION, TRAINING AND SUPPORT -- 12 POINTS

  TOTAL RAW WEIGHTED SCORE_____   X   12   =   _____
  POSSIBLE RAW WEIGHTED SCORE   (190)

  PROJECT SCHEDULE -- 2 POINTS

  TOTAL RAW WEIGHTED SCORE_____   X   2   =   _____
  POSSIBLE RAW WEIGHTED SCORE (5)

     TOTAL TECHNICAL APPROACH POINTS   _____

5.24   Technical Approach

PROJECT UNDERSTANDING AND APPROACH

Contract Attach./Sect.	Rate the following:	Score	Wt.	Weighted Score
5.2.4.1	Proposer's comprehensive narrative, captioned "Project Understanding", that illustrates the Proposer's understanding of the State's requirements and project schedule.		1	
5.2.4.2	Proposer's comprehensive narrative, captioned "Project Approach", that illustrates how the Proposer will complete the scope of services, accomplish required objectives, and meet the State's project schedule.		2	
5.2.4.3	Proposer's comprehensive narrative, captioned "Project Management", that illustrates how the Proposer will manage the project, ensure completion of the scope of services, and accomplish required objectives within the State's project schedule.		2	
	PROJECT APPROACH – TOTAL RAW WEIGHTED SCORE			
	PROJECT APPROACH – POSSIBLE RAW WEIGHTED SCORE			25

A. FUNCTIONAL REQUIREMENTS

A.1 General

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.1.a	Allow SDE to produce extract files to update the EIS system with all additions, deletions, and changes to meet Tennessee State Department of Education requirement (*See EIS Manual at www.state.tn.us/education/sm_menu.htm*).	M		10	
A.1.b	User-friendly (i.e. Graphical User Interface)	M		10	
A.1.c	Ability to set up user-defined fields for all areas	M		10	
A.1.d	During data entry, ensure that all mandatory data items are captured and prevent acceptance of inconsistent or invalid data	M		10	
A.1.e	During data entry, provide drop down menus or user defined selection lists	M		10	
A.1.f	During data entry, provide users the ability to default values	M		10	
A.1.g	Display a meaningful error message when system errors or/and data entry errors are detected	M		10	
A.1.h	Ability to interface with SDE directory (licensure database)	M		10	
A.1.i	Maintain SDE defined years of data online. (i.e. users are able to access and modify previous and next years' data)	M		10	
A.1.j	Query on any field in the SIS database	M		10	
A.1.k	Ability to perform search and sort on any and all data. To include single or combination item search and sort and the ability to use a wild card search.	O		1	
A.1.l	Compatible with Macintosh OS 8.1 or higher running Internet Explorer 5.0 or higher and Windows NT 4.0 or higher running	M		10	

	Internet Explorer 5.5 or higher				
A.1.m	The application must be a state-level centralized web-based system that can support all 136 school districts on a single database. No workstation client software or code, other than the browser, should be required to run the application. The application and the database must each reside on a separate server. The application and database servers can run in either a Windows or a Unix environment.	M		10	
A.1.n	The application must be designed to provide data redundancy through mirroring the application and data at a backup location.	M		10	
A.1.o	Monitoring and tuning of database and application performance and response time must be provided to ensure network and server capacity are efficiently utilized	M		10	
	GENERAL REQUIREMENTS – TOTAL RAW SCORE				
	GENERAL REQUIREMENTS – POSSIBLE RAW SCORE			141	

A.2   Security

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.2.a	Provide multiple access level by fields, data value and type of information. (Levels are to be determined by LEAs)	M		10	
A.2.b	Ability for each LEA to have a security administrator responsible for maintaining field level security.	M		10	
A.2.c	User authentication will be by user-id and password, assigned by LEA security administrator. LEA security administrators will be assigned by State security administrator.	M		10	
A.2.d	Provide users the ability to export data in .xls or comma delimited .txt files.	M		10	
A.2.e	Fully encrypt all data sent via internet using 128 bit secure socket layer per the current Tennessee Information Resources	M		10	

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	Architecture.				
A.2.f	Maintains an audit trail or change history (i.e. who, when and what).	M		10	
A.2.g	Allow the districts the ability to define their own user groups for security purposes.	M		10	
A.2.h	Automatic logoff after predetermined amount of time where there is no activity.	M		10	
	SECURITY REQUIREMENTS – TOTAL RAW SCORE				
	SECURITY REQUIREMENTS – POSSIBLE RAW SCORE			80	

A.3 District Calendars

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.3.a	Allows for district to have multiple active district calendars	M		10	
A.3.b	Applies rules and provides edits to meet SDE district calendar requirements. (*See EIS Manual at www.state.tn.us/education/sm_menu.htm*).	M		10	
A.3.c	Allows for modifications to district calendars	M		10	
A.3.d	Ability for districts/schools to flag any or all district calendar record types by calendar number to be extracted for upload to EIS even when no changes have been made to the district calendar	M		10	
A.3.e	Allow only valid events (EIS Manual, Appendix A – Calendar Event/Designated Day Types)	M		10	
A.3.f	Edit for a minimum of 180 student days	M		10	
A.3.g	Edit for a minimum of 200 calendar days	M		10	
A.3.h	Edit for a minimum of 10 teacher vacation days	M		10	
A.3.i	Edit for a minimum of 5 in-service/in-service optional days	M		10	

Contract Attach./ Sect.	Rate the Following:	Importance Rating	Proposer Response	Points for 'Yes' Response	Score
A.3.j	Edit for a minimum of 1 teacher/parent conference days	M		10	
A.3.k	Edit for a maximum of 4 discretionary days	M		10	
A.3.l	Edit for a maximum of 13 stockpile days (total of professional development and inclement weather)	M		10	
A.3.m	Produce the 200 Day Accountability report by district calendar	M		10	
A.3.n	Query showing the 200 Day Accountability data with calendar event details by district calendar	M		10	
	DISTRICT CALENDARS REQUIREMENTS – TOTAL RAW SCORE				
	DISTRICT CALENDARS REQUIREMENTS – POSSIBLE RAW SCORE			140	

A.4   School Calendars

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.4.a	Allows for a school to have multiple active school calendars (instructional program)	M		10	
A.4.b	Create school calendar from a district calendar	M		10	
A.4.c	Allows for modification to school calendar	M		10	
A.4.d	Applies rules and provides edits to meet SDE school calendar requirements. (*See EIS Manual at www.state.tn.us/education/sm_menu.htm*).	M		10	
A.4.e	Ability for districts/schools to flag any or all school calendar record types by school calendar number to be extracted for upload to EIS even when no changes have been made to the school calendar	M		10	
A.4.f	Edit for a minimum of 180 student days	M		10	

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.4.g	Edit for a minimum of 200 calendar days	M		10	
A.4.h	Edit for a minimum of 10 teacher vacation days	M		10	
A.4.i	Edit for a minimum of 5 in-service/in-service optional days	M		10	
A.4.j	Edit for a minimum of 1 teacher/parent conference days	M		10	
A.4.k	Edit for a maximum of 4 discretionary days	M		10	
A.4.l	Edit for a maximum of 13 stockpile days (total of professional development and inclement weather)	M		10	
A.4.m	Do not allow a individual school to indicate stockpile professional development option if the district stockpiles professional development (this option is only if the district does not stockpile professional development)	M		10	
A.4.n	Create 9 funding periods for reporting to SDE (each funding period should contain 20 instructional days)	M		10	
A.4.o	Adjust funding period begin and end dates for changes to calendar, periods 1-8 must have 20 days, period 9 may be reduced for valid changes	M		10	
A.4.p	Produce the 200 Day Accountability report by school calendar	M		10	
A.4.q	Query showing the 200 Day Accountability data with school event details and the begin and end dates by funding period by district calendar	M		10	
A.4.r	Ability to define and utilize multiple time intervals for reporting (i.e. daily, month-to-date, month-end, quarterly, year-to-date, annually, working days, semester, weekly).	M		10	
	SCHOOL CALENDARS REQUIREMENTS – TOTAL RAW SCORE				
	SCHOOL CALENDARS REQUIREMENTS – POSSIBLE RAW SCORE			180	

A.5   Student Demographics

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)

		Desirable/ Optional)			
A.5.a	Student Demographic Data				
	Full student name (first name, middle name, last name, suffix)	M		10	
	Student nickname	M		10	
	Social Security Number (required unless Student PIN is provided)	M		10	
	Student PIN (should only be used if Social Security Number is not available and then it is required)	M		10	
	Gender, Date of Birth, Birthplace, multiple birth	M		10	
	Home Language	M		10	
	Ethnicity	M		10	
A.5.b	Student previous Social Security Number	M		10	
A.5.c	Student previous name (first name, last name)	M		10	
A.5.d	Student Previous PIN	M		10	
A.5.e	Ability to determine number of days enrolled during 20-day period, number of days attended in 20-day period	M		10	
A.5.f	Title 1 instruction being administered, title 1 support services being offered	M		10	
A.5.g	Preferred language of communication	M		10	
A.5.h	Track student's "living with" information				
	Add multiple addresses for student, parents, or/and guardians	M		10	
	Parent/guardian/contact relationship code	M		10	
	Parent/Guardian/Contact Title	M		10	
	Address type (I.e., residential and mailing)	M		10	
	Ward of State Indicator	M		10	
A.5.i	Separate home, work, fax, pager, cell and emergency telephone number for each contact and the contact's preferred method of communication	M		10	
	Track student's emergency contact, family doctors, joint custody and homelessness	M		10	

	Email of each contact	O		1	
	Flag for parent/guardian not having rights to see student (restraining order, parent pickup rights)	M		10	
A.5.j	Track whether a student's parents have invoked their right to keep student info private (Privacy Status)	M		10	
A.5.k	Track information (type of services to be received) for students with 504 plan	M		10	
A.5.l	Allow student to have multiple current classifications and maintain classification history with begin and end dates for the school year	M		10	
A.5.m	Maintain student standard day and history including begin and end dates for each student standard day	M		10	
A.5.n	Maintain student history for a SDE defined number of years after graduation	M		10	
A.5.o	Track Homeroom	M		10	
A.5.p	Refusal to release Social Security number indicator (Note use of SSN or student ID number)	M		10	
A.5.q	Track program of Study	M		10	
A.5.r	Section 504 start date, end date, and accommodation fields (codes)	M		10	
A.5.s	Student membership information				
	Book Assignment (Include textbook indicator for lost, returned or damaged books)	M		10	
	Locker assignment	M		10	
	Parking eligibility and decal number	M		10	
	Off-Campus lunch eligibility	M		10	
	Parental consent for student Internet access	M		10	
	Sports participation (report to State)	M		10	
A.5.t	Scholarship Data				
	Merit Scholar	M		10	
	Academic scholar	M		10	
	Gold Seal Recipient	M		10	

	National Merit/Achievement/Hispanic Scholar	M		10	
A.5.u	Provide flags for special student circumstances (e.g., medical alert, guardian alerts)	M		10	
A.5.v	Allow for student to be flagged as ineligible for funding, and maintain history of status	M		10	
A.5.w	Track student grade assignment and maintain history with grade begin and end dates for school year	M		10	
A.5.x	Ability for districts/schools to flag any or all student record types by student Social Security Number or PIN Number to be extracted for upload to EIS even when no changes have been made to the student's data	M		10	
A.5.y	Do not allow both a student SSN and PIN number but do allow PIN number to be changed to SSN at a future date	M		10	
A.5.z	Ability to add user-defined fields for student demographics	M		10	
A.5.aa	Report showing Student Demographic Information	O		1	
A.5.bb	Generate student reports to multiple parents with different mailing addresses	D		6	
A.5.cc	Report of Students by Last Name	O		1	
A.5.dd	Report of Students by Gender	O		1	
A.5.ee	Report of Students by Student ID	O		1	
A.5.ff	Report of Students by Town/Country Code	O		1	
A.5.gg	Report of Students – Parent/Guardian	O		1	
A.5.hh	Report of Students – Telephone	O		1	
A.5.ii	Report of Household Addresses by Student	O		1	
A.5.jj	Report of Student List by Billing Household	O		1	
A.5.kk	Student List by Residence Household	O		1	
A.5.ll	Student Ethnic/Race Report by Ethnic/Race Code	M		10	
A.5.mm	Student Ethnic Race Report by Student	O		1	
A.5.nn	Ethnic Tallies by Grade	O		1	
A.5.oo	Address List Sorted by Street	O		1	
A.5.pp	Alpha List All Students Sorted by Grade Level	O		1	

Contract Attach./ Sect.		Importance Rating	Proposer Response	Points for 'Yes' Response	Score
A.5.qq	Alpha List by Guidance Counselor	O		1	
A.5.rr	Birthday List by Specified Month	O		1	
A.5.ss	Report of Ethnic Breakdown by Grade	M		10	
A.5.tt	Report on ethnic distribution	O		1	
A.5.uu	Students Standard Data Report	O		1	
A.5.vv	Student Address Labels	O		1	
A.5.ww	Student Parking Sticker Report	O		1	
A.5.xx	Emergency Contacts by Student Report	D		6	
A.5.yy	Student Locker Listing	O		1	
	STUDENT DEMOGRAPHICS REQUIREMENTS – TOTAL RAW SCORE				
	STUDENT DEMOGRAPHICS REQUIREMENTS – POSSIBLE RAW SCORE			514	

A.6   Enrollment/Transfer/Withdrawal

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.6.a	Allow for students with dual enrollments, home school and service school for students receiving services outside of their home school	M		10	
A.6.b	Roll student's demographic data from previous school year to the new school year and generate a "E" enrollment on first day of attendance for all returning students at their designated normal progression school (will not roll data at former school)	M		10	
A.6.c	Ability for districts/schools to select fields to be rolled over from previous year	M		10	
A.6.d	Permit a student enrolled as an "E" on the first day of attendance to be withdrawn on first day of attendance	M		10	

A.6.e	Track student's school assignment, grade, reason for entry, assignment date, homeroom etc.	M		10	
A.6.f	Track services for students at more than one school, student taking classes at school other than home school (service school enrollment)	M		10	
A.6.g	Warn or lock out enrollment of a student with active suspension or expulsion	M		10	
A.6.h	Support automatic grade promotion process (i.e. from 4th grade to 5th grade) unless specifically marked in system to hold student back or student failed to fulfill requirements for next grade level.	M		10	
A.6.i	Able to produce enrollment package (e.g. demographic information, class schedule)	M		10	
A.6.j	Report on primary school and additional school	M		10	
A.6.k	Transfer student record from one school to another within the district. Carry forward user-defined information (ethnicity etc.) when a student is transferred from one school to another within the district	M		10	
A.6.l	Track student withdrawal information (e.g. withdrawal reasons, withdrawal dates, comments etc.)	M		10	
A.6.m	Cancel student withdrawal	M		10	
A.6.n	Reassign classes to student upon re-enrollment during the same school year	M		10	
A.6.o	System should not allow student PIN Numbers to be re-assigned, assigned to more than one student.	M		10	
A.6.p	Check transfer records for immunization and health record flags	M		10	
A.6.q	Check student information to ensure the student is not already actively enrolled (using name, SSN or PIN) at another school statewide	M		10	
A.6.r	Ability to print list of transfer students	O		1	
A.6.s	Enrollment/Transfer/Withdrawal Reporting				
	New Student Enrollment Report	O		1	
	Students Dropped from Enrollment Report	O		1	

		Importance Rating			
	Student Re-entered Report	O		1	
	Report on inactive students showing their withdrawal information	O		1	
	Enrollment Codes Report	O		1	
	Report on active students for a user specified time range	O		1	
	Report on students withdrawn during a user specified time range by withdrawal codes	O		1	
	Report on enrollment counts by enrollment codes	O		1	
	Report on currently active students by school	O		1	
	Re-entry Codes Report	O		1	
	Withdrawal Codes Report	O		1	
	Report of Age in Grade Level	O		1	
	ENROLLMENT/TRANSFER/WITHDRAWAL REQUIREMENTS – TOTAL RAW SCORE				
	ENROLLMENT/TRANSFER/WITHDRAWAL REQUIREMENTS – POSSIBLE RAW SCORE			183	

A.7   Master Scheduling Pre-registration and Tallying

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.7.a	Maintain centralized District Course Catalog (i.e. all class offerings district wide in a centralized catalog).	M		10	
A.7.b	Maintain credit weight by course in the District Course Catalog	M		10	
A.7.c	Maintain whether a course can be taken pass/no pass in the District Course Catalog.	M		10	
A.7.d	Add and inactivate courses from District Course Catalog.	M		10	
A.7.e	Maintain Local Course Catalog by school	M		10	
A.7.f	Ability to add special courses which are not published but are	M		10	

	in approved table for the school or District				
A.7.g	Add and remove courses from Local Course Catalog by selecting and deselecting from District Course Catalog	M		10	
A.7.h	Specify whether a course is offered in fall, spring, summer or a combination of the three	M		10	
A.7.i	Specify whether a course is contained in the college core curriculum at the State, district and school level.	M		10	
A.7.j	Produce a course roster report	M		10	
A.7.k	Allow each individual school to flag those courses in their Local Course Catalog which are available to all students district-wide (rather than available only to students within that school).	M		10	
A.7.l	Produce personalized list of suggested course election for a student based on the course offerings, student's graduation requirements, student's special needs (e.g. Individual Education Plan, Bilingual/ELL etc.), credits earned on the student's transcript, and student's current schedule. The suggested course election should list only those courses available to the individual student. For areas where the student can choose between multiple courses, each course should be listed.	M		10	
A.7.m	Provide for global course change/add/delete/replace on the suggested course elections based on global searches. The system should allow the user to select a group of students and make changes to the suggested course elections for all students within the selected group.	M		10	
A.7.n	Specify student preferences for alternative electives (i.e. during scheduling, the system will attempt to schedule student with his or her first choice elective, but if not possible attempt to schedule for his or her second choice etc)	M		10	
A.7.o	Produce warning message when the user attempts to elect a course for a student that the student has already passed, even if the student passed only one semester of a two-semester course.	M		10	
A.7.p	Produce warning message when the user attempts to elect a course for a student that the student is currently taking.	M		10	
A.7.q	Produce warning message when the user attempts to elect a	M		10	

Contract Attach./ Sect.	Rate the Following:	Importance Rating	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	course for a student that the student is ineligible to take or is missing prerequisite(s).				
A.7.r	Identify whether a course request on a student's course election requires special Ed service. The system will use this data to determine how many Special Ed sections are required and to schedule the student into a Special Ed section.	M		10	
A.7.s	Identify for each course request on a student's course election whether the student requires bilingual/ELL/alternative instruction. The system will use this data to determine how many bilingual/ELL/alternative instruction sections are required and to schedule the student into the appropriate section.	M		10	
A.7.t	Ability to create a 4-year plan for student scheduling (University Track)	M		10	
A.7.u	Provide online tally report to show the total number of course requests for each course updated real-time. Provide drill-down capability from the tally into the course elections that make up the tally.	M		10	
A.7.v	Automatically determine # of courses and sections required, based on course election.	M		10	
	MASTER SCHEDULING PRE-REGISTRATION AND TALLYING REQUIREMENTS – TOTAL RAW SCORE				
	MASTER SCHEDULING PRE-REGISTRATION AND TALLYING REQUIREMENTS – POSSIBLE RAW SCORE			220	

A.8   Master Scheduling Build

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.8.a	Maintain a list of schools and related data (e.g. school ID, address etc.)	M		10	
A.8.b	Maintain multiple school calendars for a school.	M		10	

A.8.c	Support different kinds of school calendars (including: 9 weeks, quarters, trimesters, and semesters, year-round).	M		10	
A.8.d	Support different numbers of periods per day and week (i.e. 4 periods/day, 8 periods/day, rotating schedules etc.) The system should allow the user to define start and end times for periods by school calendars	M		10	
A.8.e	Ability to schedule lunch period.	M		10	
A.8.f	Allow for multiple class period durations at a school.	M		10	
A.8.g	Set a maximum size parameter for each section of a course.	M		10	
A.8.h	Maintain a list of rooms by school related room information (type of room)	M		10	
A.8.i	Set a maximum size parameter for each room. The system should not exceed the lesser of either the room maximum or the section maximum.	M		10	
A.8.j	Specify bilingual/ELL/Alternative language sections and the language of instruction for K-12	M		10	
A.8.k	Specify special Ed sections (i.e. types of special Ed service).	M		10	
A.8.l	Ability to specify special Ed course codes with multiple grade levels	M		10	
A.8.m	Set maximum number of subjects each teacher can teach. Each teacher can teach a predetermined number of classes. The system should allow the user to define on a teacher-by-teacher basis how many classes each teacher can teach.	M		10	
A.8.n	Assign teachers to specific courses based on endorsements/certifications.	M		10	
A.8.o	Assign teachers to specific sections based on endorsements/certifications. (e.g. bilingual, ELL sections)	M		10	
A.8.p	Assign multiple teachers to one section (i.e. team teaching). For example, an English I section may have an English teacher and a Special Ed teacher. The system should show both teachers on the master schedule and on the student programs.	M		10	
A.8.q	Specify valid periods by courses or by section if applicable. Some periods defined in the system are only valid with certain courses. System must allow user to note what periods are valid	M		10	

	with each course or section. If no values are assigned, the system should assume that the course could be taught during any period. This includes assigning valid lunch periods.				
A.8.r	Roll-over master schedule from previous year and make modifications if appropriate	M		10	
A.8.s	Specify non-instructional teacher periods (preparation, counseling, duties) by teacher by school.	M		10	
A.8.t	Facilitate block (multiple-period class meetings) scheduling. (i.e.. an English class might meet for two consecutive periods on Monday and Wednesday and Math class for two consecutive periods on Tuesday and Thursday rather than for a single period each day. For Fridays the blocked classes may meet one period each or meet alternating weeks for two periods each week) the system should support multiple period classes up to at least four consecutive periods as well as non-consecutive periods. The system should allow the user to specify which days in the cycle that the sections will meet.	M		10	
A.8.u	Facilitate block scheduling (e.g. combining multiple number of x weeks sub-courses to make a semester or a year-long course where students in each sub-courses will rotate around - two semester courses such as Government and Health are blocked together to make a year-long course for scheduling purpose).	M		10	
A.8.v	Facilitate scheduling for teams or family style teaching (students from the same team receives teaching from the same group of teachers for core classes. For electives, students are able to receive teaching from non-team teachers)	M		10	
A.8.w	Assign teachers to teams for family style teaching. If teachers are assigned to a team, the system is able to recognize the team and is able to give the teachers in that team a common prep period for planning purposes.	M		10	
A.8.x	Compare the number of course requests to seats provided on the master schedule (as determined by the total sections multiplied by the maximum number of seats per section).	M		10	
A.8.y	Allow user to perform "what-if" analysis by running the master schedule builder multiple times, changing parameters each time. The system should save each master schedule and allow the user to choose which one to use as the master.	M		10	

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.8.z	Sort master schedule according to any of the fields on the master schedule. Users should be able to print the master schedule according to how they have sorted it (i.e. type of credit, teacher, or students).	M		10	
A.8.aa	Display district and school master course summaries	M		10	
	MASTER SCHEDULE BUILDING REQUIREMENTS – TOTAL RAW SCORE				
	MASTER SCHEDULE BUILDING REQUIREMENTS – POSSIBLE RAW SCORE			270	

A.9   Master Scheduling Student Assignment

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.9.a	Prioritize students for scheduling based upon a random algorithm. System should not prioritize students according to name or ID.	M		10	
A.9.b	Ability to prioritize scheduling of students based on graduation requirements.	M		10	
A.9.c	System will allow scheduling priorities to be set based upon user defined criteria, including: grade level, graduation requirements, special course requirements, and predecessor course requirements.	M		10	
A.9.d	Assign students to particular sections.	M		10	
A.9.e	Assign students to a specific teacher on a teaching team.	M		10	
A.9.f	Ability to scan course requests.	M		10	
A.9.g	Freeze certain sections or courses during the master schedule build process	M		10	
A.9.h	Manually close a section so that no students can be scheduled into that section.	M		10	
A.9.i	Provide mechanism to increase the likelihood that a section will	M		10	

	fill (increase its priority).				
A.9.j	Allow for pullout classes of different lengths than the standard duration, or the ability to change the class duration.	M		10	
A.9.k	Support section leveling equity based on number of students, gender, ethnicity, special Ed, etc.	M		10	
A.9.l	Ability to notify the student's home school of summer school grades and graduations.	M		10	
A.9.m	Treat students with "open" periods as irresolvable conflicts	M		10	
A.9.n	Allow the option of exceeding section maximums when this is the only way to avoid an irresolvable conflict. The system should allow the user to specify by how many or by percentage the system can exceed the section maximum. The system should issue an online warning that can be overridden when this occurs. In contrast with the requirement that prevents section maximums from being exceeded during the proof and final runs, this requirement exists to ensure that a schedule can be produced for a student under any circumstances once school starts.	M		10	
A.9.o	Provide an on-screen report indicating section size maximum, seats filled, and seats remaining by section.	M		10	
A.9.p	Produce an on-screen conflict matrix without printing a report. The system should also allow the user to drill down into the count to see the names of each student requesting the conflicting courses.	M		10	
A.9.q	Provide conflict matrix of each student with irresolvable conflicts, indicating all courses elected and corresponding master schedule class possibilities, and flag master schedule classes that are filled.	M		10	
A.9.r	Roll data for next year's scheduling purposes and ability to update new or changed data. Ability to delete students who withdraw prior to the last day of school from the rolled data.	M		10	
A.9.s	Allow minute by minute scheduling of students.	M		10	
A.9.t	See open classrooms information for each period online (i.e. classrooms unoccupied, number of seats open in each period, etc.)	M		10	

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.9.u	See on-screen and print report by room number of all sections scheduled into each room on the master schedule. For combined sections, both sections should be printed.	M		10	
A.9.v	Provide online, real-time access to all queries and reports related to master scheduling at each school (i.e. individual schools should be able to run master schedule build and print schedule master at own sites).	M		10	
A.9.w	Assign book to courses (I.e., title of text adopted for course)	M		10	
	MASTER SCHEDULING STUDENT ASSIGNMENT REQUIREMENTS – TOTAL RAW SCORE				
	MASTER SCHEDULING STUDENT ASSIGNMENT REQUIREMENTS – POSSIBLE RAW SCORE			230	

A.10   Master Scheduling Finalize Schedule

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.10.a	Purge all versions of the master schedule except for the one used for final run (i.e. keeping "what if" queries and revert to a prior version if newer scenario does not produce better success percentage)	M		10	
A.10.b	Custom design layout of the student schedules, detailing the courses and sections each student will be taking for each period per cycle day.	M		10	
A.10.c	Custom design layout of the teacher schedules, detailing the courses and sections each teacher will be teaching for each period per cycle day.	M		10	
A.10.d	Produce class rosters based on subject, course, teacher, or student language category	M		10	
A.10.e	Report on those students who are enrolled at a school without valid schedules.	M		10	

A.10.f	Provide for global course change/add/delete/replace on student schedules based on global searches. The system should allow the user to select a group of students and make changes to the student schedules for all students within the selected group.	M		10	
A.10.g	Maintain an audit trail/change log that specifies the timestamp, user, and program when changes are made to an individual student schedule. The system should also track reason for the change.	M		10	
A.10.h	Automatically remove the student from all of his/her scheduled classes and reduce the class sizes, as well as create teacher notifications when student is withdrawn from a school.	M		10	
A.10.i	Change teacher's grade and attendance books and class roster for both the old and the new course and section assignments when changing a course on a student schedule	M		10	
A.10.j	Recall the last valid schedule for a student if a student who transferred out of a school or was marked as No Show comes back to the school during the same school year. The system should allow the user to reschedule the student into those courses on the last valid schedule, if class size allows.	M		10	
A.10.k	Make available the schedule for the transfer student in the former school online for the new school to refer to when preparing the student's schedule in the new school, when both schools are in the same district.	M		10	
A.10.l	Check that minimum criteria (i.e. passing grade) for pre-requisite class is fulfilled before allowing enrollment to dependent class.	M		10	
A.10.m	Schedule "walk-in" or transfer students manually	M		10	
A.10.n	Weight Special Ed students when counting students in class size limit (i.e. SE student equals 1.5, 2.0, other user defined criteria)	M		10	
A.10.o	Ability to schedule before / after school classes (prior to 1st period or after last period)	M		10	
A.10.p	Ability to flag any or all class record types by local class number to be extracted for upload to EIS even when no changes have been made to the class data	M		10	
A.10.q	Student Schedule	M		10	

		Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	MASTER SCHEDULING FINALIZE SCHEDULE REQUIREMENTS – TOTAL RAW SCORE				
	MASTER SCHEDULING FINALIZE SCHEDULE REQUIREMENTS – POSSIBLE RAW SCORE			170	

A.11   Attendance

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.11.a	Support different types of school calendars (i.e. quarters, trimesters, semesters, full-year)	M		10	
A.11.b	Support different numbers of periods per day and week (i.e. 4 periods/day, 8 periods/day, rotating schedules etc.) The system should allow the user to define start and end times for periods by school calendars.	M		10	
A.11.c	Take attendance by period-by-period, by half day (AM/PM) and by day.	M		10	
A.11.d	Allow for comments concerning attendance.	M		10	
A.11.e	Require teacher verification that attendance has been taken.	M		10	
A.11.f	Enter absences by teacher online	M		10	
A.11.g	Ability to scan attendance	M		10	
A.11.h	Update attendance immediately. The system should allow reporting on attendance by the following period.	M		10	
A.11.i	Do not allow teachers to change attendance data once it has been submitted for the day.	M		10	
A.11.j	Ability to track attendance, period by period, from service school to primary school.	M		10	
A.11.k	Track absence type or reasons.	M		10	
A.11.l	Ability to generate a letter of absences to parents.	M		10	
A.11.m	Track tardy (excused, unexcused and time in).	M		10	

A.11.n	Ability to print 5/10 day letters automatically or manually (switch).	M		10	
A.11.o	Pre-excuse attendance (e.g. a student is away for extracurricular activity)	M		10	
A.11.p	Define student groups (for example - marching band members) for pre-excused attendance; be able to flag early dismissal for all members of the group.	M		10	
A.11.q	Maintain students' absence history. The system should allow the users to specify how much historical data needs to be maintained (i.e. at least two years etc.)	M		10	
A.11.r	Query Average Daily Membership by teacher, class, student or homeroom.	M		10	
A.11.s	Compute Average Daily Attendance Rate	M		10	
	If student attended school less than half day the student gets an absence, if student attended school half a day (3 hours 15 minutes) then the student gets full-day attendance.				
	Average Daily Attendance Rate = Attendance in Days by Student /district Enrollment Days.				
A.11.t	Compute Average Daily Membership - Average Daily Membership = Membership in Days by Student /district Enrollment Days.	M		10	
A.11.u	When a student transfers schools or courses, attendance information is still available.	M		10	
A.11.v	Flag students with different levels of attendance problems	M		10	
A.11.w	Track attendance records and history of students with different levels of attendance problems to social workers	M		10	
A.11.x	Ability for Districts to set up criteria for perfect attendance.	M		10	
A.11.y	Record information of students to Truancy Center (white card information)	M		10	
A.11.z	Maintain attendance totals historically by student	M		10	
A.11.aa	Track early dismissal including reason and time dismissed	M		10	
A.11.bb	Track homebound students	M		10	
A.11.cc	Allow for Special Ed students to be fully serviced at another	M		10	

	location other than the home school.			
A.11.dd	Ability to track total class minutes for a student that is in and out of school during the day to determine if he is considered present for the school day.	M		10
A.11.ee	Automatically notify appropriate recipients when a student reaches a user-specified number of absence (e.g. 10 unexcused school days)	M		10
A.11.ff	Generate Absence Letters based on a user-defined number of absences. (e.g. 10 unexcused school days)	M		10
A.11.gg	Query students with more than user specified consecutive unexcused absent school days or periods	M		10
A.11.hh	Report student attendance by teacher, student demographics, semester, language category, etc.	M		10
A.11.ii	Notify Student Services when students under 18 are non-compliant with attendance policy	M		10
A.11.jj	Notify Tenn. Dept of Safety (DoS) when students under 18 are non-compliant with attendance policy or passing grades are not achieved. Generate document/form for DoS.	M		10
A.11.kk	Notify Tenn. Dept of Safety when students under 18 are back in compliance with attendance policy or passing grades are achieved. Generate document/form for DoS.	M		10
A.11.ll	Attendance Reporting			
	Absentees by Homeroom Report	O		1
	Absentee Report	O		1
	Phone Master Absentee Report	O		1
	Student Attendance Report	O		1
	Absentee Codes	O		1
	Manual Attendance Roster	O		1
	Students not in Attendance Report	O		1
	Count of Students in First Period Classes Report	O		1
	Actual Enrollment Count Sorted by Course Code and Period	O		1
	Attendance: Perfect Attendance Report	O		1

	Attendance: Excessive Absences Report	D		6	
	Attendance: End of Fourth Marking Period Report	O		1	
	Daily Attendance Report	O		1	
	Perfect Attendance Whole Year	O		1	
	Twenty Day Absentee Report	O		1	
	Twenty Day Attendance Report by First Period	O		1	
	Attendance All Classes Report	O		1	
	Report of Attendance: Aggregate/Averages	O		1	
	Compulsory Attendance Program Report	O		1	
	ATTENDANCE REQUIREMENTS – TOTAL RAW SCORE				
	ATTENDANCE REQUIREMENTS – POSSIBLE RAW SCORE			394	

A.12   Grades

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.12.a	Specify grades per class (i.e. numeric and alpha, Incomplete, Passing, No Grade, Withdrawn, etc.)	M		10	
A.12.b	Specify qualitative grades for Elementary students (i.e. observations).	M		10	
A.12.c	Specify Honors if applicable	M		10	
A.12.d	Specify Honor Roll requirements per grade level	M		10	
A.12.e	Identify Repeated Courses	M		10	
A.12.f	Identify all attempted courses	M		10	
A.12.g	Identify courses taken during Summer Sessions	M		10	
A.12.h	Specify and maintain transfer credit (i.e. credits earned from out of district schools).	M		10	

A.12.i	Provide a drop-down menu for selecting credit value of courses.	M		10	
A.12.j	Show the district and school from which transfer credits were accepted and include in the student's transcript.	M		10	
A.12.k	Allow the teacher class report to follow a student when assigned to another teacher.	M		10	
A.12.l	Provide multiple data entry tools for grade marking (e.g. online, bubble sheets, spreadsheets etc.)	M		10	
A.12.m	Ability to update grade book and submit when complete.	M		10	
A.12.n	Approved personnel can modify grades (for an active student, the student's current school is the keeper for the student record and for an inactive student, the student's most recently attended district school is the keeper of the student record).	M		10	
A.12.o	GPA Calculations				
	Specify calculation of semester GPA (i.e. semester GPA calculation is based on A=4, B=3, C=2, D=1 F=0) for regular classes and additional 0.2 honors differentials is added for each passed honor classes.	M		10	
	Specify calculation of cumulative GPA (i.e. GPA calculation is based on A=4, B=3, C=2, D=1, F=0) for regular classes and additional 0.2 honors differential is added for each passed honor's class. However only a maximum of 16 honor's classes can be counted towards the cumulative GPA calculation. Maximum cumulative (GPA is 4.4).	M		10	
	Ability to identify GPA scale to be used. (Long Avg., etc.)	M		10	
	Allow for GPA calculation using simple average (1-100 point scale).	M		10	
	Convert GPA from 100 point system to 4.0 point system.	M		10	
	Ability to specify rounding rules for GPA calculations.	M		10	
	Ability to exclude a course from a student's GPA by course number.	M		10	
	Calculate overall unweighted GPA using 4.0 point system.	M		10	
	Calculate unweighted GPA using 4.0 point system in the college core curriculum.	M		10	

A.12.p	Calculate semester class ranking based on semester GPA.	M		10	
A.12.q	Calculate cumulative class ranking based on cumulative GPA, earned credit and # of years in district	M		10	
A.12.r	Customize elementary report cards based on grade level	M		10	
A.12.s	Simple instructions for set-up and operation	M		10	
A.12.t	Allow teachers to input letter or numeric grades from the classroom	M		10	
A.12.u	Allow teachers to compute grade by points or percentages	M		10	
A.12.v	Allow teachers to determine the weight of individual assignments and/or categories	M		10	
A.12.w	Compile teacher grade analysis for individual assignments	M		10	
A.12.x	Allow teachers to use "S", "N" or check marks as performance standards	M		10	
A.12.y	Sort classes by name, gender, ethnicity, and student number	M		10	
A.12.z	Allow teachers the ability to work from school or home	M		10	
A.12.aa	Allow teacher to name each assignment individually	M		10	
A.12.bb	Allow teacher to mark an assignment as exempt for a particular student	M		10	
A.12.cc	Allow for extra credit	M		10	
A.12.dd	Ability to import and export data to and from district sources	M		10	
A.12.ee	Allow for additional comments				
	Allow for individual comments that could provide continuous history of the child's academic progress	D		6	
	Additional comments from a user defined list	D		6	
	Allow additional room for comments about grades to be entered	D		6	
A.12.ff	Allow special grade codes (I.e. NB = No Book)	M		10	
A.12.gg	Allow flexibility to change grades, averages and drop grades	M		10	
A.12.hh	Allow flexibility on report card format and data	M		10	
A.12.ii	Ability to set sort flags for report card distribution	M		10	
A.12.jj	Flag notification of missing or incomplete grades	M		10	

A.12.kk	Auto-fill grades, i.e. assign same grade to an entire class of students; be able to toggle on/off for auto-fill	M		10	
A.12.ll	Ability to scan grades	M		10	
A.12.mm	Query students who are below and above a user-specified GPA or grade by single or multiple criteria (i.e. grade level, teacher, subject, alphabetically, etc).	M		10	
A.12.nn	Generate Student Reports				
	Generate Progress Reports on-demand for one student or entire class of students.	O		1	
	Generate Deficiency Reports on-demand for one student or entire class of students.	O		1	
	Generate Grade Reports for user-specified grade reporting period (e.g. a grade report may include 9 week progress, final exam grade and final course grade)	O		1	
	Generate reports for failing students in order to properly notify and verify with student's parents/guardians.	D		6	
	Create grade reports by student and class for individual assignments	O		1	
	Report of Students-GPA	O		1	
	Grade Type Listing by Category	O		1	
	Grade Type Listing by Type	O		1	
	Grade Code List by Code	O		1	
	Honor Roll Criteria Report	O		1	
	Grade Verification Report	O		1	
	Report of Students Missing Grades	D		6	
	Alphabetic Honor Roll List	O		1	
	Class Rank Report by Class	O		1	
	Semester Grade Roster	O		1	
	Tally of Grades by Instructor	O		1	
	Transcript Reports	O		1	
	Class Rank List Sorted by GPA Order	O		1	

	Failure Letter Fourth Marking Period	O		1	
	Failure Lists First Semester	O		1	
	Produce Report Card Verification Sheet	O		1	
A.12.oo	Produce Transcript Labels	M		10	
A.12.pp	Produce letters to the parent giving notification of courses the student is in danger of failing	M		10	
A.12.qq	Produce Transcripts showing course, course location, subject, grade, credit, Honors, Repeated Course, Summer Session, class rank, cumulative GPA, semester GPA, earned credit, credit analysis and results by year (grade) by student. Print Unofficial Transcripts and Official Transcripts by student, by grade or by school.	M		10	
A.12.rr	Produce Report Cards for Students	M		10	
	GRADES REQUIREMENTS – TOTAL RAW SCORE				
	GRADES REQUIREMENTS – POSSIBLE RAW SCORE			549	

A.13   Graduation Requirement

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.13.a	Track whether a student graduated (Y, N, or blank), diploma received (Y or N), and future plans (i.e. 2-year college, 4-year, etc.)	M		10	
A.13.b	Specify overall credit requirements by subject by grade for graduation.	M		10	
A.13.c	Specify credit requirements by subject by grade.	M		10	
A.13.d	Maintain multiple versions of graduation requirements by school or by year.	M		10	
A.13.e	Specify a version of graduation requirements by student.	M		10	
A.13.f	Ability to specify diploma type by student (Regular, Special	M		10	

Contract Attach./ Sect.	Rate the Following:	Importance Rating	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	Education, GED).				
A.13.g	Default diploma type to Regular Diploma.	M		10	
A.13.h	Track early withdraw code vs. early withdraw for GED graduates.	M		10	
A.13.i	Specify calculation of total earned credits. (i.e. total earn credits calculation is based on the sum of the credit weighting for all applicable courses).	M		10	
A.13.j	Track student progress towards graduation (i.e. credit analysis - credit required, credit obtained and credit remaining).	M		10	
A.13.k	Track English and Spanish versions of Tennessee High School Competency Exam results (i.e. Composition, Language Arts, Reading, Mathematics, Social Studies, Science)	M		10	
A.13.l	Allow for individual course waivers	M		10	
A.13.m	Verify that credits and attendance are achieved in order to fulfill graduation or promotion requirement	M		10	
A.13.n	Create scholarship warnings Report	M		10	
A.13.o	Produce honor roll and Straight "A" letters	M		10	
A.13.p	Students by Degree Type Report	M		10	
A.13.q	Students by Graduation Year Report	M		10	
	GRADUATION REQUIREMENTS – TOTAL RAW SCORE				
	GRADUATION REQUIREMENTS – POSSIBLE RAW SCORE			170	

A.14   Testing/Assessment

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.14.a	Import test results for tests including, but not limited to, TerraNova, Reading Assessment (English and Spanish), Writing Assessment, National Assessment of Education	M		10	

	Progress (NAEP), High school Competency Exam, Gateway, et al.				
A.14.b	Gateway weighting to include verification that attendance and credits are achieved in order to fulfill promotion or graduation requirements.	M		10	
A.14.c	Ability to upload test results for TerraNova at State level, not at districts or schools.	M		10	
A.14.d	Ability to pull faculty and student data from SDE database for State testing.	M		10	
A.14.e	Track in-house developed tests	M		10	
A.14.f	Analyze improvement/progression for students and programs. The system should facilitate analysis for a single student, grade, school, cluster, program, or English proficiency category.	M		10	
A.14.g	Change as assessment requirements change (i.e. a new test is developed and results need to be tracked)	M		10	
A.14.h	Maintain test and assessment history	M		10	
A.14.i	Set exclusion flags on students who may be excluded from having to pass a course or test	M		10	
A.14.j	Provide 'Free and Reduced Lunch' indicator for testing	M		10	
A.14.k	Provide history of cumulative testing files by student	M		10	
A.14.l	Record tests such as TCAP, Gateway, ACT, PSAT, AP scores, etc.	M		10	
A.14.m	Create test results by class to send to teachers	M		10	
A.14.n	Collect and record various types of test scores (e.g. Stanine, raw, % scaled, standard deviation)	M		10	
A.14.o	Online access to test scores	M		10	
A.14.p	Maintain at least 3 years test data	M		10	
A.14.q	Produce a report that compares course grades to commensurate TCAP assessment results, by teacher	M		10	
A.14.r	Create report when a student does not meet requirement for the grade level	M		10	
A.14.s	Report on student test information at any level. (E.g. multiple	M		10	

Contract Attach./ Sect.		Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	test by student, grade, school, language category, etc.)				
A.14.t	Classify or group test info by parameters (i.e. a content standard in math) and produce a report by that standard	M		10	
	TESTING/ASSESSMENT REQUIREMENTS – TOTAL RAW SCORE				
	TESTING/ASSESSMENT REQUIREMENTS – POSSIBLE RAW SCORE			200	

A.15   Discipline

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.15.a	Track disciplinary offenses and actions by student	M		10	
A.15.b	Allow disciplinary action duration to cross school years	M		10	
A.15.c	Categorize type of offenses (valid codes are in EIS Manual)	M		10	
A.15.d	Ability to add disciplinary reasons by district, in addition to the State approved reasons, and convert to a valid State reason code	M		10	
A.15.e	Track type and length of student consequence(s)/disciplinary intervention(s) (e.g. in-school suspension, community service, short term suspension, long term suspension, expulsion etc.) by student	M		10	
A.15.f	Allow district the option of moving or not moving disciplinary data upon transfer within district	M		10	
A.15.g	Do not allow more than 10 days total of suspension for Special Education students per school year	M		10	
A.15.h	Ability for a district to define a disciplinary infraction point system	M		10	
A.15.i	Define types of consequences/disciplinary interventions by	M		10	

	school				
A.15.j	Track discipline referrals by teachers, department, date, etc.	M		10	
A.15.k	Apply disciplinary actions to attendance automatically (mark as absent)	M		10	
A.15.l	Maintain student's disciplinary history and produce report ("Rap sheet")	M		10	
A.15.m	Control access to student's disciplinary records (i.e. only approved personnel from the school the student is currently attending should be able to see student's disciplinary history records)	M		10	
A.15.n	Query students suspended, expelled, or remanded by type of offense and/or date	M		10	
A.15.o	Allow alternative schools to be able to indicate half-day scheduling (i.e. morning/afternoon) that is used in continuation schools	M		10	
A.15.p	Track if an alternative school student has received his/her GED	M		10	
A.15.q	Validate student birthday vs. action code to determine if action is allowed for age	M		10	
A.15.r	Track expulsions				
	Ability to indicate an expulsion was due to zero tolerance	M		10	
	Indicate zero tolerance expulsions on End of Year report	M		10	
A.15.s	Build a conduct/incident history tracking file for juvenile offenders, I.e. probation officer information, DJJ involvement and contact information	M		10	
A.15.t	Ability to change begin and end dates for zero tolerance offenses	M		10	
A.15.u	Allow for additional zero tolerance rules (bus suspension, etc.)	M		10	
A.15.v	Generate incident tracking number	M		10	
A.15.w	Ability to email notifications for teacher / student complaints using the tracking number for future reference	M		10	
A.15.x	Ability to insert comments into student's discipline incident or history report	M		10	
A.15.y	Note primary and secondary offenses	M		10	

A.15.z	Ability to indicate "Child in State Custody"	M		10	
A.15.aa	Generate warnings for Special Ed students Disciplinary Actions	M		10	
A.15.bb	Generate notifications to student's original school (administrator) regarding the student's progress at alternative schools (grades, attendance etc.)	M		10	
A.15.cc	Ability to print incident report immediately in security office	M		10	
A.15.dd	Ability to automatically notify parents of discipline events: printed letter, email, integration to IVR system, etc.	M		10	
A.15.ee	Individual Student Discipline Profile	M		10	
A.15.ff	Notice of Disciplinary Action	M		10	
A.15.gg	Total Number of Suspensions and Expulsions for Current Year	M		10	
A.15.hh	Discipline Counts by Code Excluding ISS	M		10	
A.15.ii	Discipline Counts by Code for ISS	M		10	
A.15.jj	Discipline Master Log	M		10	
A.15.kk	Discipline Report Lists # of Occurrences per Day	M		10	
	DISCIPLINE REQUIREMENTS – TOTAL RAW SCORE				
	DISCIPLINE REQUIREMENTS – POSSIBLE RAW SCORE			380	

A.16   Transportation

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.16.a	Track whether students are taking buses to school or not.	M		10	
A.16.b	Track whether students are taking buses to Vocational/Career Enrichment Center (CEC) or not	M		10	
A.16.c	Track student's transportation information (eligibility and bus stop information)	M		10	

Contract Attach./ Sect.		Importance Rating	Proposer Response	Points for 'Yes' Response	Score
A.16.d	Allow for multiple bus numbers for AM/PM	M		10	
A.16.e	Track school zone when a student travels outside of the home school zone.	M		10	
A.16.f	Track route, stop locations, pick-up time, drop-off time, and last revision date of a route (need to determine what this is for)	M		10	
A.16.g	Track bus ridership	M		10	
A.16.h	Ability to mass change the bus number for all students assigned to a specific bus	M		10	
A.16.i	Ability for schools to see route sheet	M		10	
A.16.j	Print Transportation Roster by School	M		10	
A.16.k	Print stickers with route information for students on first day of school (Elementary)	M		10	
A.16.l	Busing Information by Student	M		10	
A.16.m	Students by Bus Number/Route	M		10	
A.16.n	List of Bus Riders on Selected Bus	M		10	
A.16.o	Track students bus eligibility. Track students by bus route, including students that decline to ride the bus.	M		10	
A.16.p	Easily retrieve students' emergency contact information by transportation Roster	M		10	
	TRANSPORTATION REQUIREMENTS – TOTAL RAW SCORE				
	TRANSPORTATION REQUIREMENTS – POSSIBLE RAW SCORE			160	

A.17   Health

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.17.a	Maintain student's health information including Medicaid,	M		10	

Contract Attach./ Sect.	Rate the Following:	Importance Rating	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	insurance, diagnoses, medication, health progress, vision, scoliosis, and hearing assessments, height and weight and blood pressure. (Follow HIPAA privacy rules)				
A.17.b	Track students' health concerns. Print list of students with special health needs.	M		10	
A.17.c	Track multiple immunization status (DPT, OPV, MMR, etc.) including immunization dates, conditionals, exceptions and immunity	M		10	
A.17.d	Track students' immunization process and alerts nurses when actions need to be taken (i.e. certain immunization needs to be taken in specified sequence and time frames. The system should help nurses ensure the immunization is taken in a timely manner)	M		10	
A.17.e	Change as immunization requirements change (i.e. a new kind of immunization is mandated by the state)	M		10	
A.17.f	Allow for accident tracking	M		10	
A.17.g	Limit health information only to qualified staff	M		10	
A.17.h	Allow for waivers based on health	M		10	
A.17.i	Health-related comments/instructions	M		10	
A.17.j	Alert nurses when a student's immunization data is incomplete	M		10	
A.17.k	List of students and their physicians	M		10	
A.17.l	Maintain a parent contact log for health-related issues	M		10	
	HEALTH REQUIREMENTS – TOTAL RAW SCORE				
	HEALTH REQUIREMENTS – POSSIBLE RAW SCORE			120	

A.18   Exceptional Student Education (ESE)

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.18.a	Track: Amount of Special Ed services being received, type of	M		10	

	services being received, most recent evaluation date, additional services needed after exits (i.e. mental health services, vocational rehabilitation, developmental disabilities services, physical therapy, etc)			
A.18.b	Track a student's eligibility, capture start dates of S-team process, track days remaining to maintain timeline	M	10	
A.18.c	Track ESE services a student is receiving.	M	10	
A.18.d	Track service hours received and recommendations.	M	10	
A.18.e	Track participation and time spent in general education.	M	10	
A.18.f	Monitor the referral and assessment functions to ensure that specified activities are performed within established schedule requirements.	M	10	
A.18.g	Maintain referral and assessment results for categorical programs linked to corresponding student information.	M	10	
A.18.h	Search for appropriate instructors for assignment to a special service student based on location, qualifications, and availability.	M	10	
A.18.i	Track IEP information to corresponding student information.	M	10	
A.18.j	Record and compute IEP milestone dates and accomplishment information.	M	10	
A.18.k	Assess performance/effectiveness of special services.	M	10	
A.18.l	Track special situation students (i.e. at home students, hospitalized students, AEP (Alternative Education Placement) or those students with overlapping ESE needs.	M	10	
A.18.m	Input and assess Special Ed goals on student IEP forms and progress reports.	M	10	
A.18.n	Track ESE drop-out rate.	M	10	
A.18.o	Compare each IEP recommendation for testing participation with the actual participation.	M	10	
A.18.p	Provide ability to pull up a student's past ESE schedules even after he/she has been entered into a new school	M	10	
A.18.q	Provide actual amount to time served in each ESE service	M	10	
A.18.r	Identify students placed in Gifted.	M	10	

A.18.s	Identify ESE programs available at specific schools	M		10	
A.18.t	Project students to schools based on address and disability with override capability	M		10	
A.18.u	Track participation in SE (active or inactive), and date of IEP	M		10	
A.18.v	Flag notification of three year evaluation time expiration	M		10	
A.18.w	Track interim students within the SE process, but not fully established	M		10	
A.18.x	Track handicapping codes	M		10	
A.18.y	Track history of evaluations and date of last evaluation	M		10	
A.18.z	Ability to make special scheduling considerations for SE students	M		10	
A.18.aa	Reserve number of seats in GE classes	M		10	
A.18.bb	Balance SE students across GE classes	M		10	
A.18.cc	Track case load and class size of SE teachers	M		10	
A.18.dd	Horizontal Student Lateral Report Sp. Ed.	M		10	
A.18.ee	Automatically notify appropriate recipients a predetermined period prior to IEP milestone dates coming due (i.e. via email alerts)	M		10	
A.18.ff	Automatically identify missing information (IEP components) and notify appropriate party	M		10	
A.18.gg	Produce ad hoc management reports showing all upcoming timelines for a district/school/teacher/child.	M		10	
A.18.hh	Generate IEP report cards for administrators, teachers, and parents on an ad hoc basis	M		10	
A.18.ii	Special Education Reporting				
	June End of Year report	O		1	
	New Enrollment report	O		1	
	Gender/Ethnic report	O		1	
	Child Count by System report	O		1	
	Option Count by District report	O		1	
	End of Year report	O		1	

A.18.jj	Special Education Student Data				
	Id Number, SSN or PIN	M		10	
	Reason student is less than full service	M		10	
	Primary disability	M		10	
	Secondary disability	M		10	
	Contractual service – full time services only	M		10	
	Separate Facility (Y/N)	M		10	
	Student type	M		10	
	Activation date (date of first IEP)	M		10	
	Evaluation date – primary	M		10	
	Evaluation date – secondary	M		10	
	Type of service	M		10	
	Number of sessions and unit of time	M		10	
	Time per session	M		10	
	Service provider	M		10	
	Reason student transported	M		10	
	Type of special transportation	M		10	
	Number of one way trips and frequency	M		10	
	Travel time one way	M		10	
	Special transportation provider	M		10	
	Inactive status date	M		10	
	Reason for inactive status	M		10	
	Anticipated services	M		10	
	89-313 Eligibility (Y/N)	M		10	
	Special transportation required	M		10	
	Materials only	M		10	
	Guardian information	M		10	
A.18.kk	Name/School data	M		10	
	Last Name				

	First Name				
	Middle Name				
	Date of Birth				
	Gender				
	Grade				
	Ethnicity				
	District Number				
	School Number				
	Status of service				
A.18.ll	Staff data requirements	M		10	
	SSN or TLN				
	Last name				
	First name				
	Middle initial				
	Fully certified (Y/N)				
A.18.mm	Staff category data				
	Retained for next year (Y/N)	M		10	
	Category	M		10	
	Full time equivalent	M		10	
	EXCEPTIONAL STUDENT EDUCATION REQUIREMENTS – TOTAL RAW SCORE				
	EXCEPTIONAL STUDENT EDUCATION REQUIREMENTS – POSSIBLE RAW SCORE			656	

A.19   Language Services (ELL/Alternative Language)

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)

		Optional)			
A.19.a	Track: Program Participation hours in English Language Learners (Y or N), Date last assessed as ELL, and Report date (i.e. 40th day, 80th day, 120th day, or 180th day, language spoken at home, instruction language, state reading and comprehension assessment status (Y or N), native language reading and comprehension assessment status (Y or N), native language test administered, national reading and comprehension percentile rank, whether student reclassified to English proficient, method used to determine English proficiency (test and informal)).	M		10	
A.19.b	Track whether a student's parents have waived their rights to receive ELL services.	M		10	
A.19.c	Track and maintain students Home Language Survey (HLS) results (i.e. eligibility)	M		10	
A.19.d	Track students' Language Assessment (IDEA/IPT) results and/or waiver.	M		10	
A.19.e	Maintain student's IPT history	M		10	
A.19.f	Language Assessment Tests may change over time. Describe how test results can be compared over time as the test changes.	M		10	
A.19.g	Track ELL/alternative language services students are receiving. The system should Track the service provider, type of service, service hours received, curriculum and maintain history.	M		10	
A.19.h	Track student progress and exit them from the Alternative Language monitoring program as appropriate (i.e. monitor student to ensure they maintain Fully English Proficient (FEP) status as they move away from Limited English Proficiency (LEP) status)	M		10	
A.19.i	Search for appropriate instructors for assignment to a ELL student based on location, qualifications, and availability	M		10	
A.19.j	Search for appropriate facilities for assignment to an ELL student based on location, availability and resources. (i.e. language lab)	M		10	

A.19.k	Search for bus routes for schools assigned outside of Zone when language needs dictate.	M		10	
A.19.l	Track current and next years projected school assignment for language needs.	M		10	
A.19.m	Facilitate preliminary assessment of performance/effectiveness of ELL services. (Including: language proficiency scores / hours of instruction / type of services / by student and in aggregate.)	M		10	
A.19.n	Track ELL Student Tutoring assignments	M		10	
A.19.o	Provide ability for a school and district to receive a cumulative report of ESE students with the total number of days suspended	M		10	
A.19.p	Track student's psychologist/social work referrals from referral to placement (I.e., referral date, Child Study Team meeting dates, test scores)	M		10	
A.19.q	Provide check to allow special placement only for students with specific district-defined ESE requirements	M		10	
A.19.r	Print forms for distribution to parents, teachers, administrators, etc with student bio-data pre-filled when applicable.	M		10	
A.19.s	Notify school when ESE students have been officially staffed/placed in an ESE program.	M		10	
A.19.t	Input, query, and produce reports from language information including: PHLOTE (Primary Home Language Other Than English), IPT (IDEA Proficiency Test), or ALS (Alternative Language Services).	M		10	
A.19.u	Report any other non-regular services received by ELL students	M		10	
	LANGUAGE SERVICES REQUIREMENTS – TOTAL RAW SCORE				
	LANGUAGE SERVICES REQUIREMENTS – POSSIBLE RAW SCORE			210	

A.20   Special Services

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.20.a	Track Title 1 A, 1 B (state & federal even start services), 1C (Migrant status), 1D (Neglected and Delinquent youth), IV, VI, VII, VIII, IX, Johnson-O'Malley Financial Assistance to Native American participation status, and Exit date.	M		10	
A.20.b	Track students free and reduced lunch eligibility (Do not show on first page for privacy reasons) ; maintain at State instead of at schools	M		10	
A.20.c	Free Lunch Roster	M		10	
	SPECIAL SERVICES REQUIREMENTS – TOTAL RAW SCORE				
	SPECIAL SERVICES REQUIREMENTS – POSSIBLE RAW SCORE			30	

A.21   Faculty

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.21.a	Match certification, endorsement, and availability of instructors with criteria for required positions	M		10	
A.21.b	Tenure / Non-Tenure indicator	M		10	
A.21.c	Track personnel training	M		10	
A.21.d	Track new hire background checks	M		10	
A.21.e	Track personnel performance				
	Define staff evaluation cycles (Record date of last evaluation and when next evaluation is due)	M		10	

A.21.f	Track certifications	M		10	
A.21.g	Report only professional staff (members with current assignments) to EIS	M		10	
A.21.h	Ability to track faculty demographics (address, local ID number, etc.)	M		10	
A.21.i	Ability for districts/schools to flag any or all staff record types by staff Social Security Number or License Number to be extracted for upload to EIS even when no changes have been made to the staff member's data	M		10	
A.21.j	Check for Highly Qualified for 'No Child Left Behind' (NCLB)	M		10	
A.21.k	Teacher/Sub Listing	M		10	
A.21.l	Teacher Effect Pattern Report	M		10	
A.21.m	Report on resource allocations, availability and utilization.	M		10	
A.21.n	Track personnel training	M		10	
	FACULTY REQUIREMENTS – TOTAL RAW SCORE				
	FACULTY REQUIREMENTS – POSSIBLE RAW SCORE			140	

A.22   Counseling

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.22.a	Report on 'at risk' students to determine what services have been provided in the past.	M		10	
A.22.b	Track referrals not related to discipline/ESL/etc, including: counseling, speech, home bound, social work, attendance, psychology, occupational/physical therapy. Track date of referral, reason for referral. Include access to history of referrals for a student.	M		10	
A.22.c	Maintain the confidentiality of referral or other entered information.	M		10	

Contract Attach./ Sect.		Importance Rating	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.22.d	For psychological referrals, track: initial reason for referral, re-evaluation results, screening results, supplemental testing results.	M		10	
A.22.e	Track receipt of parent's informed consent.	M		10	
A.22.f	Track and report against pre-established time requirements for steps in process (ex. 40 days from referral to testing). LEA will determine if exceptions are allowed.	M		10	
A.22.g	Counseling reports: monthly reports including: number of parents seen, number of students seen, types of interventions, discipline, etc.	M		10	
A.22.h	Allow for tracking and report post graduation information including scholarships, college graduations, etc.	M		10	
	COUNSELING REQUIREMENTS – TOTAL RAW SCORE				
	COUNSELING REQUIREMENTS – POSSIBLE RAW SCORE			80	

A.23   Adult and Community Education

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.23.a	Allow student registration for adult and community education	M		10	
A.23.b	Ability to track fees/tuition for adult and community education	M		10	
A.23.c	Ability for reconciliation of fees/tuition for adult and community education	M		10	
A.23.d	Ability to schedule students/classes for adult and community education	M		10	
A.23.e	Track attendance and report for adult and community education	M		10	
A.23.f	The system can convert class attendance to hours / course credits for reporting	M		10	

Contract Attach./ Sect.		Importance Rating	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.23.g	Track adult/vocational test scores (GED, certifications, etc.)	M		10	
A.23.h	Ability to check pre-requisites for registration and scheduling adult and community education, including: prior course requirements, testing history and dates, etc.	M		10	
A.23.i	Ability to schedule based on minimum class size and notify when minimums are not met	M		10	
A.23.j	Generate mailings for ELL classes based on the ELL student enrollment	M		10	
A.23.k	Provide transcripts for adult and community education	M		10	
A.23.l	Should not report adult students to EIS or transmit adult student extracts to EIS	M		10	
	ADULT AND COMMUNITY EDUCATION REQUIREMENTS – TOTAL RAW SCORE				
	ADULT AND COMMUNITY EDUCATION REQUIREMENTS – POSSIBLE RAW SCORE			120	

A.24   Student Activity Fund and Other Fees

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.24.a	Ability to handle the collection by teachers of funds and fees	M		10	
A.24.b	Generate collection lists in advance for special activities, clubs, athletics, etc.	M		10	
A.24.c	Ability for teachers or administrators to enter special assessments for students, such as for lost or damaged text books, other student damages, etc.	M		10	
A.24.d	Ability to wave student fees based on special flags (free and reduced lunch students, etc.)	M		10	
A.24.e	Ability to hold transcripts or report cards when fees are owed (Applies to tuition students only)	M		10	

Contract Attach./ Sect.		Importance Rating	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
A.24.f	Ability to provide reports or other tools to support collection reconciliation between the teacher and the book-keeper	M		10	
A.24.g	Ability to track payments/refunds to students				
	Track tuition or fee payments made by students at school level or district level	M		10	
	Allow for installment payments for tuition and other fees	M		10	
A.24.h	Ability to track collection status (partial collections, etc.)	M		10	
	STUDENT ACTIVITY FUND AND OTHER FEES REQUIREMENTS – TOTAL RAW SCORE				
	STUDENT ACTIVITY FUND AND OTHER FEES REQUIREMENTS – POSSIBLE RAW SCORE			90	

A.25   Standard Reporting Requirements

A.25.a   General Report / Queries

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	Select and group reporting data by any field with sub-totals and sort orders.	O		1	
	In a year round school, report on the different tracks by school	O		1	
	Middle School Reports	O		1	
	Unassigned Locker Listing	O		1	
	Calculate and display school free/reduced lunch totals by school	D		6	
	Provide Meals Summary Report	O		1	
	District Performance Data Tables	O		1	
	Reading Gains Required to Reach Norm	O		1	
	Facilitate ordering textbooks based on curriculum and student	O		1	

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	enrollment				
	Maintain list of approved text books by course on the District Course Catalog	O		1	
	Maintain list of required and optional textbook by course on the local course catalog	O		1	

A.25.b   Student Reports / Queries

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	Print Exclusion Sheet	O		1	
	Print Exclusion Letters	O		1	
	Students by Guidance Counselor	O		1	
	Students by Homeroom	O		1	
	Schedule Request Forms	O		1	
	Student Schedules by Semester/Guidance Counselor And Tally of Credits	O		1	
	Print Student Schedules Using Student Roll	O		1	
	Head Count Report	O		1	
	National Honor Society	O		1	
	Honor Roll Listing	O		1	
	Honor Roll Listing, semester	O		1	
	Dropout Report	M		10	
	Promotions/Rejections	M		10	
	Promotions/Rejections (same grade level)	M		10	
	Codes Report	O		1	
	Counts by Case Manager	O		1	
	Course List Showing State Code #'s for Preliminary Reports	O		1	

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	Class Rolls with Address and Phone Number	O		1	

A.25.c   Course Reports / Queries

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	Print Course/Semester Catalog	O		1	
	Preliminary Course Roster	O		1	
	Report of Preliminary Course Enrollment	O		1	
	Preliminary Course Frequency Report	O		1	
	Preliminary Course Roster	O		1	
	Print Conflict Lists	O		1	
	Actual Course Frequencies	O		1	
	Class Roster Report	O		1	
	Scheduling Intermediate Totals	O		1	
	Scheduling Exceptions	O		1	
	Print Room Schedules	O		1	
	Print Instructor Schedules	O		1	
	Course List with Section Number by Teacher	O		1	
	STANDARD REPORTING REQUIREMENTS – TOTAL RAW SCORE				
	STANDARD REPORTING REQUIREMENTS – POSSIBLE RAW SCORE			74	

A.26   Ad-Hoc Query Requirements

Contract	Rate the Following:	Importance Rating (Most	Proposer	Points for 'Yes'	Score (For State's Use

Attach./ Sect.		Desirable/ Desirable/ Optional)	Response	Response	Only)
A.26.a	Menu driven, process driven, and GUI interface reporting.	M		10	
A.26.b	Drill-down reporting capabilities are provided.	O		1	
A.26.c	Routing list definitions support:				
	Routing or distribution lists can be defined for reports	O		1	
	Documents can be sent electronically according to defined routing lists	O		1	
A.26.d	Query Searching Capabilities:				
	Queries/searches can be used with reports	M		10	
	Queries/searches can be used with mass updates	O		1	
	On-screen searching can be used	M		10	
	Free-form text searching capability is included	M		10	
	Full text searching is provided	M		10	
	Search definitions are stored	M		10	
	Scanned documents can be searched for key words	O		1	
A.26.e	Table look ups:				
	Table fields are clearly identified or distinguished from other fields on screens	M		10	
	Tables can be referred to when on a table look-up field	M		10	
	Table entries are effective-dated	M		10	
	Changes to tables create a historical table entry	M		10	
A.26.f	Report and Printer Controls:				
	The system can control the number of copies made of a report	M		10	
	The system can control priority of reporting	M		10	
	The system can control job start time for reports	M		10	
	End-user can control the fonts in rows and columns of a report	M		10	
	End-user can define the character style in rows and columns (bold, italics, etc.) of a report	M		10	

A.26.g	Ad Hoc Reporting:				
	Ad hoc report definitions are stored	O		1	
	Ad hoc reports can be run in the background	O		1	
	Standard reports provided can be modified as ad hoc queries	O		1	
A.26.h	Third Party report generators can be used to access the application files	M		10	
A.26.i	Graphing – Are the following graphing or charting capabilities built in:				
	Line graphs	O		1	
	Bar charts	O		1	
	Pie charts	O		1	
	Scatter charts	O		1	
	Stacked bar	O		1	
	Mid/min/max line graph	O		1	
	Polar	O		1	
	Regression lines	O		1	
	The end-user can toggle between chart and supporting data	O		1	
A.26.j	File export: (Reports printed are exported to .xls or .txt files)				
	The system can create a file in a common file format to facilitate interfaces with other applications	M		10	
	SIF compliance	M		10	
	The system can support file export to:				
	Spreadsheets	M		10	
	Word processing applications	M		10	
	Database management systems	M		10	
	Organization chart utilities	M		10	
	Graphics packages	M		10	
	Forms packages	M		10	
	E-mail systems	M		10	
	Faxes	M		10	

	Other computers	M		10	
A.26.k	The following arithmetic and statistical functions are supported in report writing:				
	Sum	M		10	
	Average	M		10	
	Minimum	M		10	
	Midpoint	M		10	
	Maximum	M		10	
	Standard deviation	M		10	
	Regression analysis	M		10	
	Median	M		10	
A.26.l	An end-user can define formulas in reports	M		10	
A.26.m	The formatting of dates in reports can be end-user controlled	M		10	
A.26.n	An end-user can define a report's sort order	M		10	
A.26.o	An end-user can change a report's sort order at report run time	M		10	
A.26.p	End-user defined sort definitions can be stored and reused	M		10	
A.26.q	An end-user can share stored report definitions with other end-users	M		10	
A.26.r	The ability to produce a report of students participating in sports sorted by gender / ethnicity	O		1	
	AD-HOC QUERY REQUIREMENTS – TOTAL RAW SCORE				
	AD-HOC QUERY REQUIREMENTS – POSSIBLE RAW SCORE			428	
	SECTION A – FUNCTIONALITY – TOTAL RAW SCORE				
	SECTION A – FUNCTIONALITY – TOTAL POSSIBLE RAW SCORE			5929	

B. IMPLEMENTATION, TRAINING AND SUPPORT

B.1   Data Conversion

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Most Desirable/ Desirable/ Optional)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
B.1.a	Proposer understands that they must be able to convert existing data to a format designated by the State.	M		10	
B.1.b	Proposer understands that there must be edits provided in the Statewide Student Management software to ensure the data captured is valid and consistent.	M		10	
B.1.c	Proposer understands that there must be the ability for data to be exported locally in a text format.	M		10	
B.1.d	Proposer understands the Statewide Student Management software will interface with the State Department of Education licensure database.	M		10	
	DATA CONVERSION—TOTAL RAW SCORE				
	DATA CONVERSION—POSSIBLE RAW SCORE			40	

B.2   Implementation

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Mandatory/ Critical/ Desirable	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
B.2.a	Proposer can meet projected schedule of implementation and SDE requirements.	M		10	
B.2.b	Proposer commits and guarantees that the software will be implemented in a timely manner.	M		10	

	IMPLEMENTATION—TOTAL RAW SCORE				
	IMPLEMENTATION—POSSIBLE RAW SCORE			20	

B.3   Training

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Mandatory/ Critical/ Desirable)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
B.3.a	Proposer understands that an on-line system user manual that can be modified by SDE staff must be provided.	M		10	
B.3.b	Proposer understands that an on-line help utility must be provided for the software for all data fields available on the screen.	M		10	
B.3.c	Proposer understands that training must be provided on data importing and manipulation for Local Education Agencies and State Department of Education technical staff.	M		10	
	TRAINING—TOTAL RAW SCORE				
	TRAINING—POSSIBLE RAW SCORE			30	

B.4   On-Site Support

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Mandatory/ Critical/ Desirable	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
B.4.a	Proposer understands that they must provide on-site support for the Local Education agencies as requested by SDE to include existing data conversion, loading of data to database, and correcting software-related data issues. Support should be available within 24 hours of	M		10	

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Mandatory/ Critical/ Desirable)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
	request.				
B.4.b	Proposer understands that they must provide on-site support for the SDE technical staff to include existing data conversion, loading of data to database, and correcting software-related data issues Monday – Friday, 7:00am – 5:00pm CST	M		10	
B.4.c	Proposer understands that they must provide LEA and SDE on-site support for the duration of the contract.	M		10	
	ON-SITE SUPPORT—TOTAL RAW SCORE				
	ON-SITE SUPPORT—POSSIBLE RAW SCORE			30	

B.5   Documentation

Contract Attach./ Sect.	Rate the Following:	Importance Rating (Mandatory/ Critical/ Desirable)	Proposer Response	Points for 'Yes' Response	Score (For State's Use Only)
B.5.a	Proposer understands they must provide a plain language data dictionary.	M		10	
B.5.b	Proposer understands they must provide a description of all data fields available, including which fields are protected and which fields are non-protected.	M		10	
B.5.c	Proposer understands they must provide a description of the functionality available in the software, including attendance, grade book, special education, scheduling and discipline.	M		10	
B.5.d	Proposer understands they must provide written procedures for running queries and producing reports.	M		10	
B.5.e	Proposer understands they must provide written instructions for data lookup and update.	M		10	
B.5.f	Proposer understands they must provide detailed descriptions of possible causes of error messages.	M		10	
B.5.g	Proposer understands they must provide documentation on any	M		10	

	and all add-on functions/modules available for the software.			
	DOCUMENTATION – TOTAL RAW SCORE			
	DOCUMENTATION – POSSIBLE RAW SCORE		70	
	SECTION B – IMPLEMENTATION, TRAINING AND SUPPORT – TOTAL RAW SCORE			
	SECTION B – IMPLEMENTATION, TRAINING AND SUPPORT – POSSIBLE RAW SCORE		190	

	TOTAL – SECTIONS A AND B		6119	

C. PROJECT SCHEDULE

Contract Attach/Sect.	Rate the Following:	Score	Wt.	Weighted Score
C.1	Proposer understands the project schedule and what is to occur each year		1	
	PROJECT SCHEDULE – TOTAL RAW WEIGHTED SCORE			
	PROJECT SCHEDULE – POSSIBLE RAW WEIGHTED SCORE			5

ATTACHMENT 9.4

COST PROPOSAL EVALUATION FORMAT

RFP # 331.25-001

Proposer Name

RFP Coordinator   **Date**

The RFP Coordinator shall use the following to calculate the Proposer's <u>total</u> proposed cost for purposes of evaluation.

I. Total Cost Calculation

The proposer's cost per year per ADM, as listed in the Cost Proposal in attachment 9.2, shall be input in the column (a) for each respective year.   The RFP Coordinator will calculate the total <u>extended cost for each year</u> by multiplying the cost per year per ADM (a) times an estimated ADM frequency (b), and place the resultant figure under the column labeled "Total Cost".

Year One Pilot Year Cost Schedule January 1, 2003 through June 30, 2004

Total Cost Calculation	(a) Cost per Year Per ADM	(b) Estimated ADM	(a) x (b) = Total Cost
Line			
1 Cost per ADM for Data Conversion, Implementation, and Training for 25 pilot districts	$	97,000	$
2 Cost per ADM for Support for 25 pilot districts (to be prorated based on implementation date)	$	97,000	$
Pilot Year Total Cost			$

Year Two Cost Schedule from July 1, 2004 through June 30, 2005

	Total Cost Calculation	(a) Cost per Year Per ADM	(b) Estimated ADM	(a) x (b) = Total Cost
Line				
1	Cost per ADM for Data Conversion, Implementation, and Training for additional districts.	$	189,000	$
2	Cost per ADM for Support for Year Two additional districts (to be prorated based on implementation date).	$	189,000	$
3	Cost Per ADM for Annual Maintenance and Support for districts implemented in Year One.	$	97,000	$
			Year Two Total Cost	$

Year Three Cost Schedule from July 1, 2005 through June 30, 2006

	Total Cost Calculation	(a) Cost per Year Per ADM	(b) Estimated ADM	(a) x (b) = Total Cost
Line				
1	Cost per ADM for Data Conversion, Implementation, and Training for additional districts	$	189,000	$
2	Cost per ADM for Support for Year Three additional districts (to be prorated based on implementation date)	$	189,000	$
3	Cost Per ADM for Annual Maintenance and Support for districts implemented in Year One and Year Two	$	286,000	$
			Year Three Total Cost	$

Year Four Cost Schedule from July 1, 2006 through June 30, 2007

	Total Cost Calculation	(a) Cost per Year Per ADM	(b) Estimated ADM	(a) x (b) = Total Cost
Line				
1	Cost per ADM for Data Conversion, Implementation, and Training for additional districts	$	189,000	$

		(a)	(b)	(a) x (b) = Total Cost
2	Cost per ADM for Support for Year Four additional districts (to be prorated based on implementation date).	$	189,000	$
3	Cost Per ADM for Annual Maintenance and Support for districts implemented in Years One, Two, and Three.	$	475,000	$
	Year Three Total Cost			$

Year Five Cost Schedule from July 1, 2007 through June 30, 2008

Total Cost Calculation	(a) Cost per Year Per ADM	(b) Estimated ADM	(a) x (b) = Total Cost
Line			
1 Cost Per ADM for Annual maintenance and support for districts implemented in Years One, Two, Year, and Four.	$	644,000	$
Year Five Total Cost			$

The total cost for evaluation purposes:

Year 1 (Pilot) Total Cost	
Year Two Total Cost	
Year Three Total Cost	
Year Four Total Cost	
Year Five Total Cost	
Total Cost for Evaluation of the Proposal	

The RFP Coordinator shall use the proposed cost for evaluation amount derived from cost proposals and the following formula to calculate the **SCORE** for the subject cost proposal (calculations shall result in numbers rounded to two decimal places).

$$\frac{\text{lowest proposed cost for evaluation}}{\text{proposed cost for evaluation being evaluated}} \quad \text{X maximum cost points} \quad = \text{SCORE of cost proposal being evaluated}$$

1. Lowest total proposed cost amount from <u>all</u> proposals:	

2.	The total proposed cost for <u>this</u> proposal:	
3.	The amount calculated by dividing the amount in row #1 by the amount in row #2:	
4.	The maximum number of points that shall be awarded for the Cost Proposal category:	30
5.	**COST PROPOSAL SCORE** -- the product calculated by multiplying the amount in row #3 by the number in row #4:	

ATTACHMENT 9.5

PROPOSAL SCORE SUMMARY MATRIX
RFP # 331.25-001

[SIGNATURE]
_____

RFP Coordinator   **Date**

	[PROPOSER NAME]		[PROPOSER NAME]		[PROPOSER NAME]	
QUALIFICATIONS AND EXPERIENCE **Maximum Points: 35**						
[EVALUATOR NAME]						
[EVALUATOR NAME]						
[EVALUATOR NAME]						
[EVALUATOR NAME]						
[EVALUATOR NAME]						
AVERAGE SCORE:		**AVERAGE SCORE:**		**AVERAGE SCORE:**		
TECHNICAL APPROACH **Maximum Points: 35**						
[EVALUATOR NAME]						
[EVALUATOR NAME]						
[EVALUATOR NAME]						
[EVALUATOR NAME]						
[EVALUATOR NAME]						
AVERAGE SCORE:		**AVERAGE SCORE:**		**AVERAGE SCORE:**		
COST PROPOSAL **Maximum Points: 30**						
SCORE:		**SCORE:**		**SCORE:**		
PROPOSAL SCORE (Maximum 100 Points)						
TOTAL SCORE:		**TOTAL SCORE:**		**TOTAL SCORE:**		

NOTE: Use as many sheets as necessary to summarize scores for all Proposers evaluated.

ATTACHMENT 9.6

SAMPLE EVALUATION NOTICE

[AGENCY LETTERHEAD]

[DATE]

[NAME]
[COMPANY NAME]
[STREET ADDRESS]
[CITY, STATE, ZIP]

Dear [NAME],

Thank you for your proposal in response to RFP number 331.25-001. The state has completed its evaluation of proposals in response to this Request for Proposals, and the subject procurement records are open for public inspection.

[NAME OF APPARENT BEST EVALUATED PROPOSER] is the apparent best evaluated proposer that the state will consider for contract award. This notice is NOT an acceptance of any offer, and the state retains the right to reject any proposal.

In accordance with the subject RFP and state law, this notice shall NOT create rights, interests, or claims of entitlement in the apparent best evaluated proposer or any vendor. No vendor shall acquire any such right unless and until a contract is fully signed by all appropriate state officials.

We appreciate your interest in providing services to the State of Tennessee and hope that you will respond to future Requests for Proposals.

Sincerely,

[AGENCY HEAD SIGNATURE]

PERFORMANCE BOND

> The Surety Company issuing bond shall be licensed to transact business in the State of Tennessee by the Tennessee Department of Commerce and Insurance. Bonds shall be certified and current Power-of-Attorney for the Surety's Attorney-in-Fact attached.

KNOW ALL BY THESE PRESENTS:

That we,

(Name of Principal)

(Address of Principal)

as Principal, hereinafter called the Principal, and

(Name of Surety)

(Address of Surety)

as Surety, hereinafter called the Surety, do hereby acknowledge ourselves indebted and securely bound and held unto the State of Tennessee as Obligee, hereinafter called the Obligee, and in the penal sum of

$5,000,000 for the period January 1, 2003 to June 30, 2005 and
$2,500,000 for the period July 1, 2005 to June 30, 2008

(Dollar Amount of Bond)

good and lawful money of the United States of America, for the use and benefit of those entitled thereto, for the payment of which, well and truly to be made, we bind ourselves, our heirs, our administrators, executors, successors, and assigns, jointly and severally, firmly by these presents.

BUT THE CONDITION OF THE FOREGOING OBLIGATION OR BOND IS THIS:

WHEREAS, the Obligee has engaged the Principal for a sum not to exceed

---

(Contract Maximum Liability)

to complete Work detailed in the Scope of Services detailed in the State of Tennessee Request for Proposals bearing the RFP Number:

331.25-001

and further detailed in a written Contract bearing the Contract Number (assigned by the State of

Tennessee):

(Contract Number)

a copy of which said Request for Proposals and Contract are by reference hereby made a part hereof, as fully and to the same extent as if copied at length herein.

NOW, THEREFORE, if the Principal shall fully and faithfully perform all undertakings and obligations under the Contract hereinbefore referred to and shall fully indemnify and hold harmless the Obligee from all costs and damage whatsoever which it may suffer by reason of any failure on the part of the Principal to do so, and shall fully reimburse and repay the Obligee any and all outlay and expense which it may incur in making good any such default, and shall fully pay for all of the labor, material, and Work used by the Principal and any immediate or remote sub-contractor or furnisher of material under the Principal in the performance of said Contract, in lawful money of the United States of America, as the same shall become due, then this obligation or bond shall be null and void, otherwise to remain in full force and effect.

AND for value received, it is hereby stipulated and agreed that no change, extension of time, alteration, or addition to the terms of the Contract or the Work to be performed thereunder or the specifications accompanying the same shall in any wise affect the obligation under this bond, and notice is hereby waived of any such change, extension of time, alteration, or addition to the terms of the Contract or the Work or the specifications.

IN WITNESS WHEREOF the Principal has hereunto affixed its signature and Surety has hereunto caused to be affixed its corporate signature and seal, by its duly authorized officers, on this

_____ day of _____ , _____ .

WITNESS:

_____	_____
(Name of Principal)	(Name of Surety)
_____	_____
(Authorized Signature of Principal)	(Signature of Attorney-in-Fact)
_____	_____
(Name of Signatory)	(Name of Attorney-in-Fact)
_____	_____
(Title of Signatory)	(Tennessee License Number of Surety)